The SuperManager

eCommerce order processor

by SuperWare LLC

User's Manual

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Published 29 Mar 2014

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1.0 Introduction

Dear Store Owner,

Thank you for your purchase of The SuperManager. Our intention at **SuperWare, LLC** is to provide you with quality software and tools to improve your business, allowing you to focus your efforts on promoting and expanding your business. We hope you are satisfied with your purchase and that you will find this piece of software useful in your daily store management.

Please feel free to contact us via e-mail at info@thesupermanager.com.

More information can be found on our website at http://www.thesupermanager.com.

Thanks and good luck!

David Johns

President
SuperWare, LLC

E-mail Contacts:

Technical Support	info@thesupermanager.com
Sales	sales@thesupermanager.com

Instant Message Contacts:

AOL Instant Messenger	username = “thesupermanager”
Yahoo! Messenger	username = “thesupermanager”
MSN Messenger	username = “thesupermanager”

Web based support and help:

The SuperManager User’s Manual	http://www.thesupermanager.com/sm_usersmanual.pdf
The SuperManager Forum	http://www.thesupermanager.com/forum
The SuperManager Website FAQ	http://www.thesupermanager.com/forum/index.php/board,6.0.html

Phone: **(909) 248-4860**

2.0 Quick Start

This is a quick start method to begin using The SuperManager immediately; to download, print and charge orders. You will want to read this manual thoroughly to take full advantage of the many options offered with The SuperManager.

1. To begin using The SuperManager, install the software by running “SuperManager.msi” and then follow the prompts.

2. Next, open the "Store Settings" dialog by selecting "View", then "Store Settings…" from the menu to input all your Store Information and critical login information. Login information is required to retrieve and send data to Yahoo!.

3. Next, download orders by clicking menu "View", then "Orders". Once you are in the Orders Screen, press the “Get New Orders” button. The first time you download orders, SuperManager will ask you for a range of orders to download. Choose a logical starting point for the orders you wish to track in The SuperManager. You may want to start with orders from the current year, month, etc… Enter this order in the “From” box and the word “last” in the “To” box and click “OK”.

4. The first time you download orders you will be prompted to download your products. Generally it is a good idea to choose to do this, but it is not necessary. SuperManager will add products to your product list as orders containing them are downloaded, however, it will only compile a complete list of possible product options if the product list is downloaded.

5. To print orders, select the order(s) in the Order List and then right mouse button click and click "Print Invoice" or press ctrl-P. Several report templates are installed with SuperManager. These can be customized using an html editor.

6. To charge orders, select the order(s) in the Order List and then right click select "Charge" from the drop down menu. The orders will be charged through your Yahoo! Merchant service.

3.0 Tips and Tricks

Here is a short list of tips and tricks that will help you make the most of The SuperManager.

1. Click the "Log Onto Yahoo! Order Manager" button to automatically log on to your Yahoo! store manager. This step is not required before using other functions requiring SuperManager to login to your store. It is just provided as a convenience to you in performing other tasks in your Yahoo! Store manager.

2. Download your products before you get new orders for the first time and keep your product database up to date by downloading products on a regular basis (see section 9.0).

3. Use The SuperManager to process all of your credit card transactions. This will ensure that your accounting export information is correct (see section 10.1).

4. Send PayPal payment requests and reminders with the send email template function (see section 8.0).

5. Use the send email template to send marketing emails to your customers.

6. Use the pre-defined keyboard shortcuts to speed up your processing

Key Sequence	Action
Ctrl-N	New .smg database file
Ctrl-S	Save .smg database file
Ctrl-O	Open .smg database file
Ctrl-A	Select all orders in the current list
Ctrl-P	Print default invoice for the selected orders
Alt-O	Get new orders
Alt-C	Charge selected orders
Alt-P	Download new PayPal Payments
Alt-D	XML exchange with Dazzle
Alt-E	Export the default text export format
Alt-I	Import the default text import format
Alt-Q	XML exchange with QuickBooks
Alt-B	Submit batches

4.0 Requirements and Installation

4.1. Requirements

4.1.a Minimum

Internet Explorer:	5.0
Processor:	486/66 MHz
Operating System:	Windows 98, 98SE, ME, NT4.0, 2000, or XP
Memory:	16MB RAM for Windows 98 and 98SE
	32MB RAM for Windows ME, NT 4.0, 2000 and XP
Internet Connection:	28.8k modem

4.1.b Recommended

Internet Explorer:	6.0 or higher
Processor:	Greater than 800 MHz
Operating System:	Windows XP
Memory:	128MB RAM
Internet Connection:	High speed connection (cable, DSL or LAN)

4.2. Installation

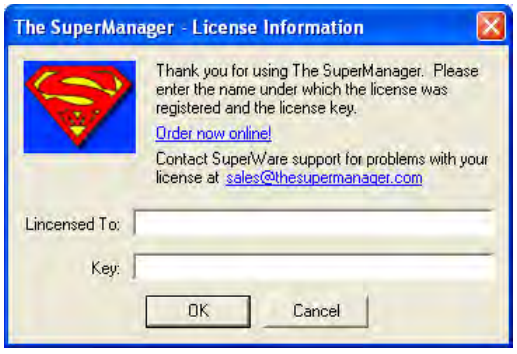
Follow these steps to install your copy of The SuperManager.

1. Have your license user name and license key on hand to enter in The SuperManager after installation. You should have received this via email.

2. Download the installer file from the location described in the registration email that was sent to you. Save the file to your local hard drive or open it directly after downloading.

3. Run SuperManager.msi file and follow the installation instructions.

4. When prompted, enter your license name and license key exactly as you have received it.


The SuperManager - License Information
Thank you for using The SuperManager. Please enter the name under which the license was registered and the license key.
Order now online!
Contact SuperWare support for problems with your license at sales@thesupermanager.com
Lincensed To:
Key:
OK
Cancel

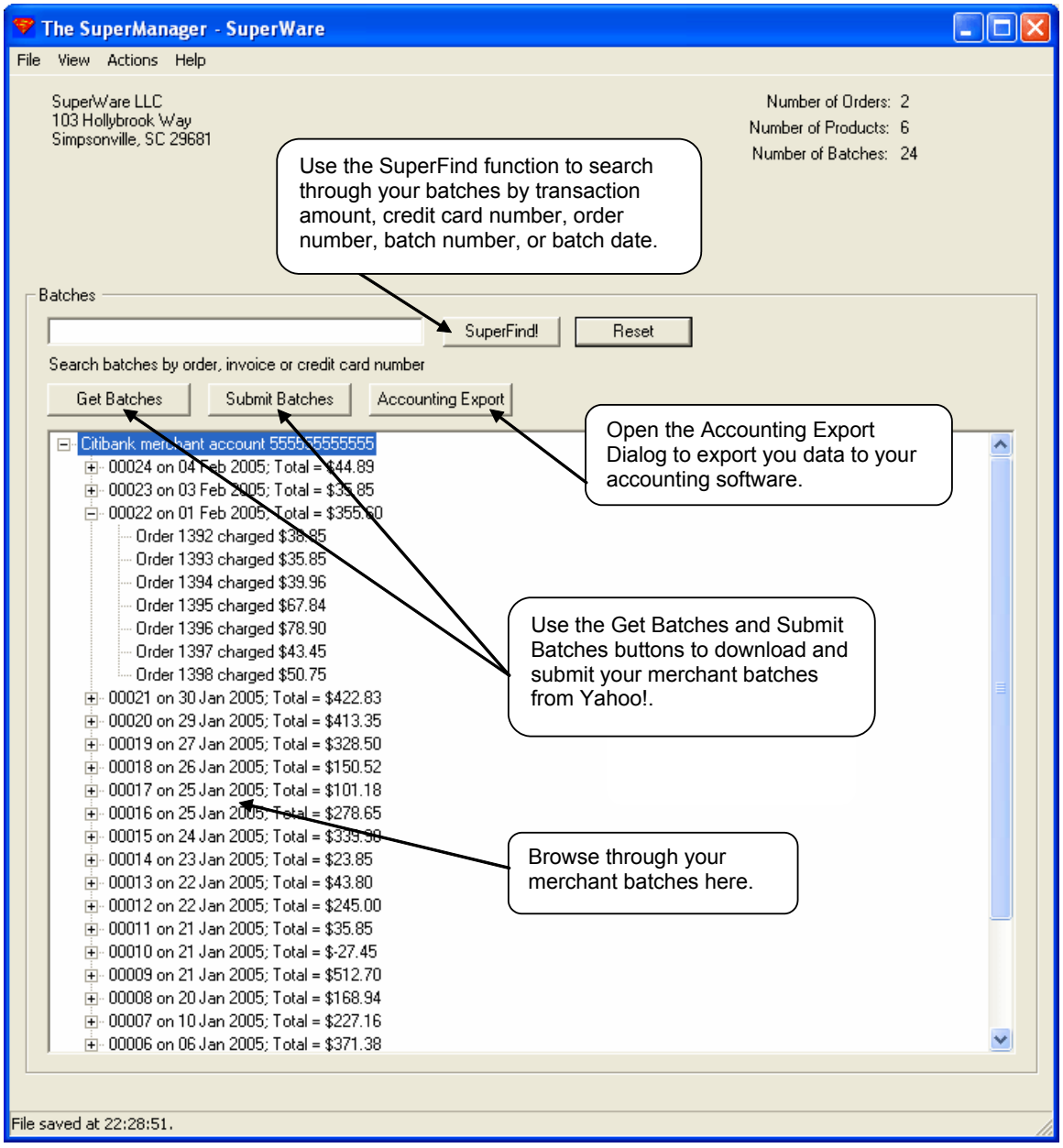
5. Congratulations, you are now ready to begin using The SuperManager!

5.0 The SuperManager Dialog Windows

The SuperManager is organized into several dialog windows for viewing and managing the information of your store.

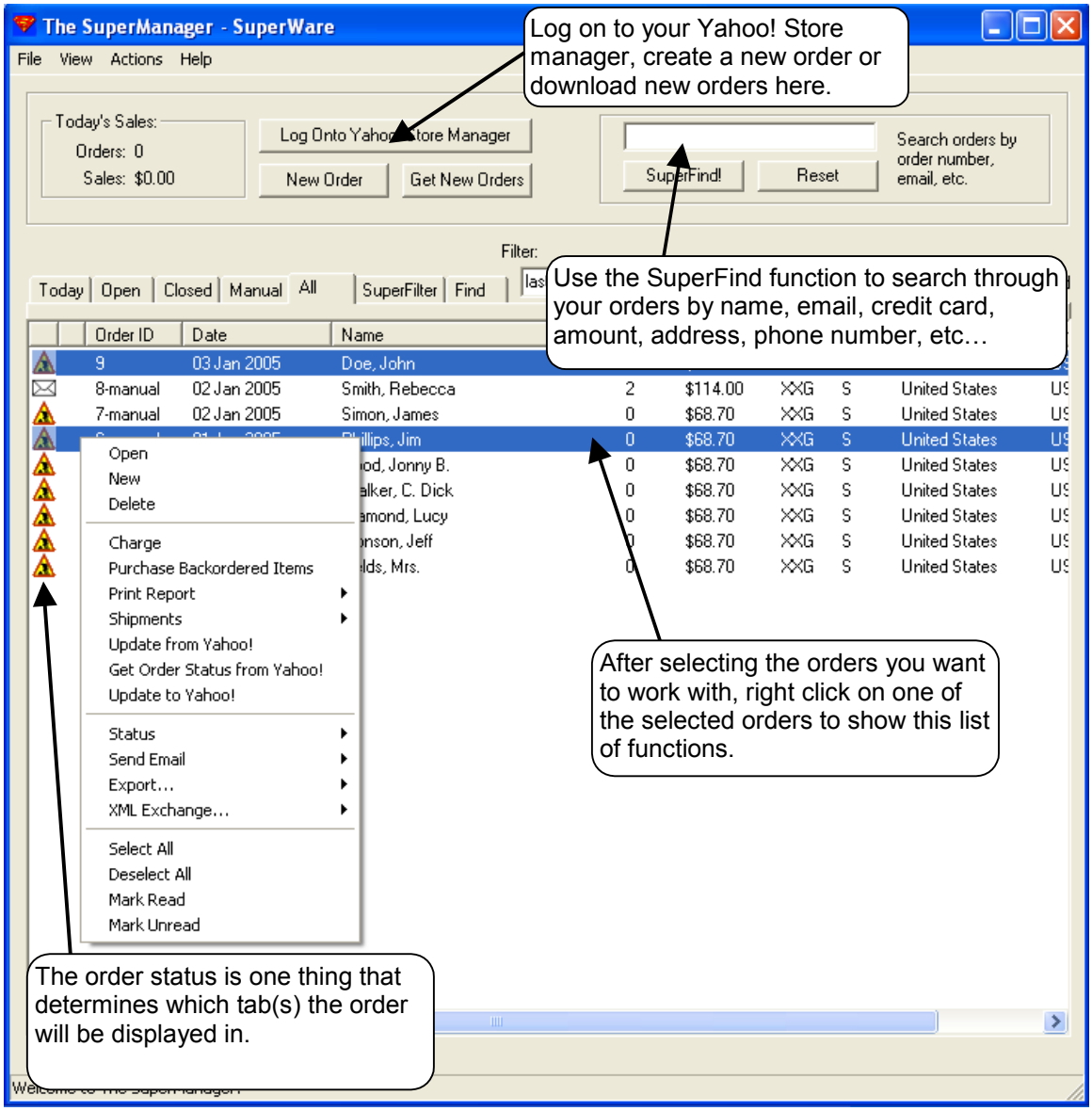
5.1. Admin Dialog Window

Manage your merchant batches from the Admin Dialog Window. The main features are described below.


The SuperManager - SuperWare
File View Actions Help
SuperWare LLC
103 Hollybrook Way
Simpsonville, SC 29681
Number of Orders: 2
Number of Products: 6
Number of Batches: 24
Use the SuperFind function to search through your batches by transaction amount, credit card number, order number, batch number, or batch date.
Batches
SuperFind!
Reset
Search batches by order, invoice or credit card number
Get Batches
Submit Batches
Accounting Export
Open the Accounting Export Dialog to export you data to your accounting software.
Use the Get Batches and Submit Batches buttons to download and submit your merchant batches from Yahoo!.
Browse through your merchant batches here.
Citibank merchant account 5555555555555
00024 on 04 Feb 2005; Total = $44.89
00023 on 03 Feb 2005; Total = $35.85
00022 on 01 Feb 2005; Total = $355.60
Order 1392 charged $38.85
Order 1393 charged $35.85
Order 1394 charged $39.96
Order 1395 charged $67.84
Order 1396 charged $78.90
Order 1397 charged $43.45
Order 1398 charged $50.75
00021 on 30 Jan 2005; Total = $422.83
00020 on 29 Jan 2005; Total = $413.35
00019 on 27 Jan 2005; Total = $328.50
00018 on 26 Jan 2005; Total = $150.52
00017 on 25 Jan 2005; Total = $101.18
00016 on 25 Jan 2005; Total = $278.65
00015 on 24 Jan 2005; Total = $339.38
00014 on 23 Jan 2005; Total = $23.85
00013 on 22 Jan 2005; Total = $43.80
00012 on 22 Jan 2005; Total = $245.00
00011 on 21 Jan 2005; Total = $35.85
00010 on 21 Jan 2005; Total = $-27.45
00009 on 21 Jan 2005; Total = $512.70
00008 on 20 Jan 2005; Total = $168.94
00007 on 10 Jan 2005; Total = $227.16
00006 on 06 Jan 2005; Total = $371.38
File saved at 22:28:51.

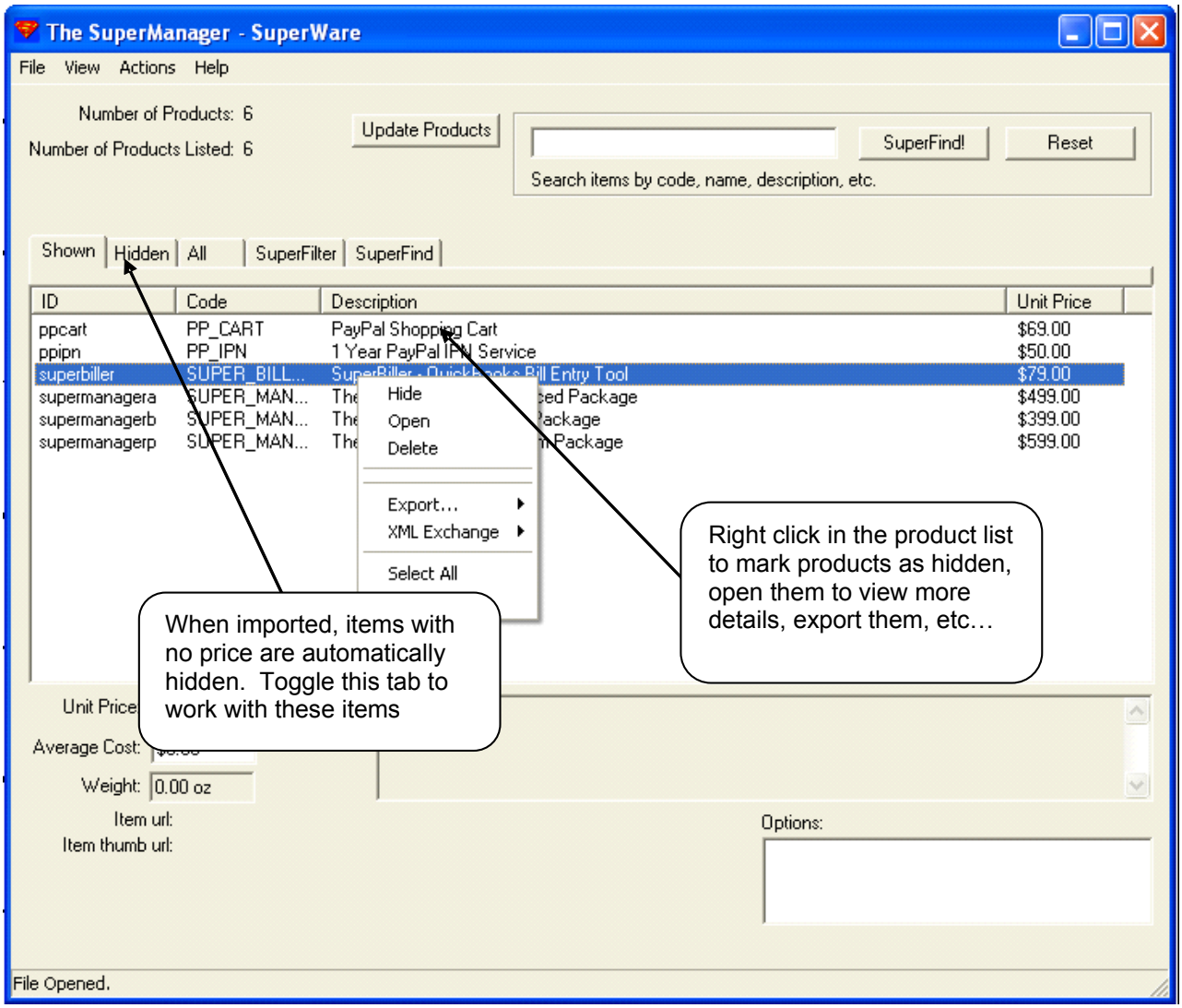
5.2. Orders Dialog Window

Manage your orders in batches from the Orders Dialog Window. You can print invoices, charge credit cards, export to shipping software, enter weights or shipping tracking numbers, send emails based on pre-defined templates and many other tasks.


The SuperManager - SuperWare
File View Actions Help
Today's Sales:
Orders: 0
Sales: $0.00
Log Onto Yahoo Store Manager
New Order
Get New Orders
SuperFind!
Reset
Search orders by order number, email, etc.
Filter:
Today Open Closed Manual All SuperFilter Find
Order ID Date Name
9 03 Jan 2005 Doe, John
8-manual 02 Jan 2005 Smith, Rebecca 2 $114.00 XXG S United States
7-manual 02 Jan 2005 Simon, James 0 $68.70 XXG S United States
0 $68.70 XXG S United States
0 $68.70 XXG S United States
0 $68.70 XXG S United States
0 $68.70 XXG S United States
0 $68.70 XXG S United States
Open
New
Delete
Charge
Purchase Backordered Items
Print Report
Shipments
Update from Yahoo!
Get Order Status from Yahoo!
Update to Yahoo!
Status
Send Email
Export...
XML Exchange...
Select All
Deselect All
Mark Read
Mark Unread
Log on to your Yahoo! Store manager, create a new order or download new orders here.
Use the SuperFind function to search through your orders by name, email, credit card, amount, address, phone number, etc…
After selecting the orders you want to work with, right click on one of the selected orders to show this list of functions.
The order status is one thing that determines which tab(s) the order will be displayed in.

5.3. Products Dialog Window

View and work with your product list in the products dialog window.



5.4. Store Settings Dialog Window

This set of property pages allows you to input and edit preferences and settings specific each store database, such as Yahoo! Passwords and usernames, email template, shipping and payment methods and so forth. Each of the tabs in the store settings will be shown in section 7.0.

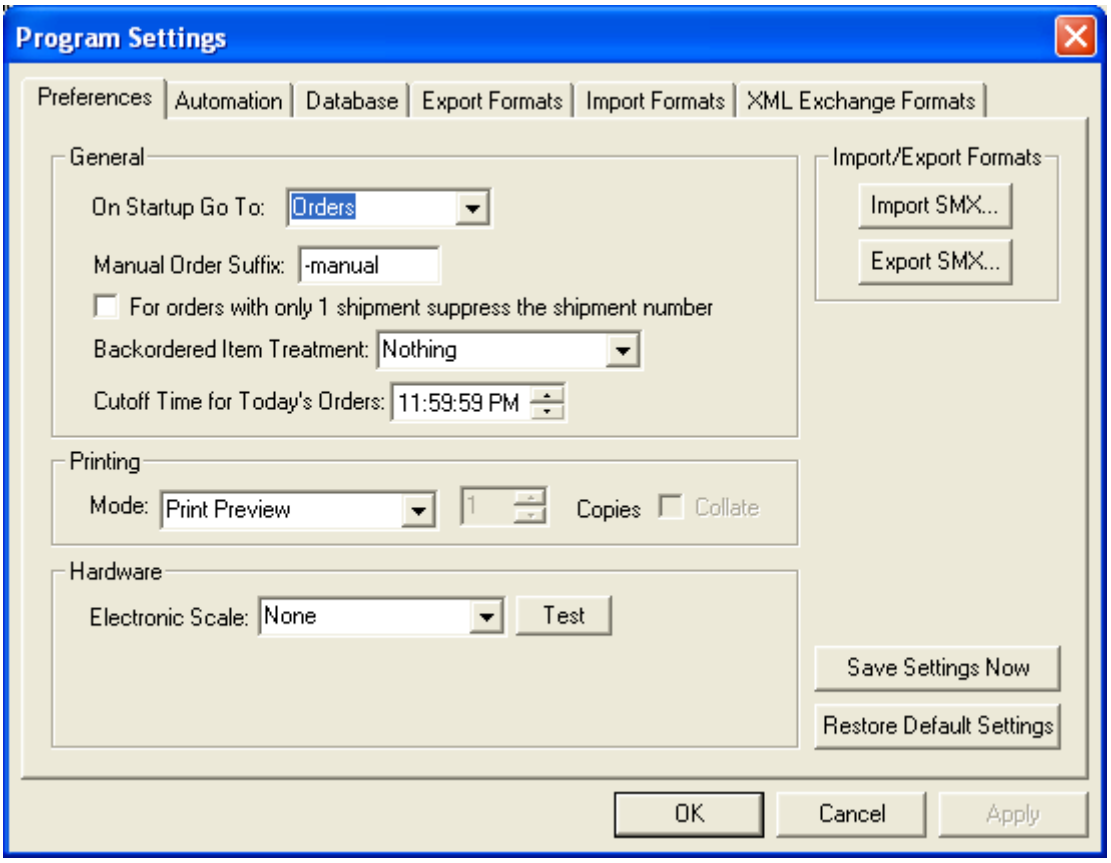
5.5. Program Settings Dialog Window

This set of property pages allows you to change settings that remain constant among all the store databases you may use in The SuperManager. It includes automatic download of orders, specification of which fields to save and import and export formats. Each of the tabs in the store settings will be shown in section 6.0.

6.0 Program Settings / Setup

Program settings are global settings used with The SuperManager and will not change when you open a new *.smg database file (Store Database File).

6.1. Preferences

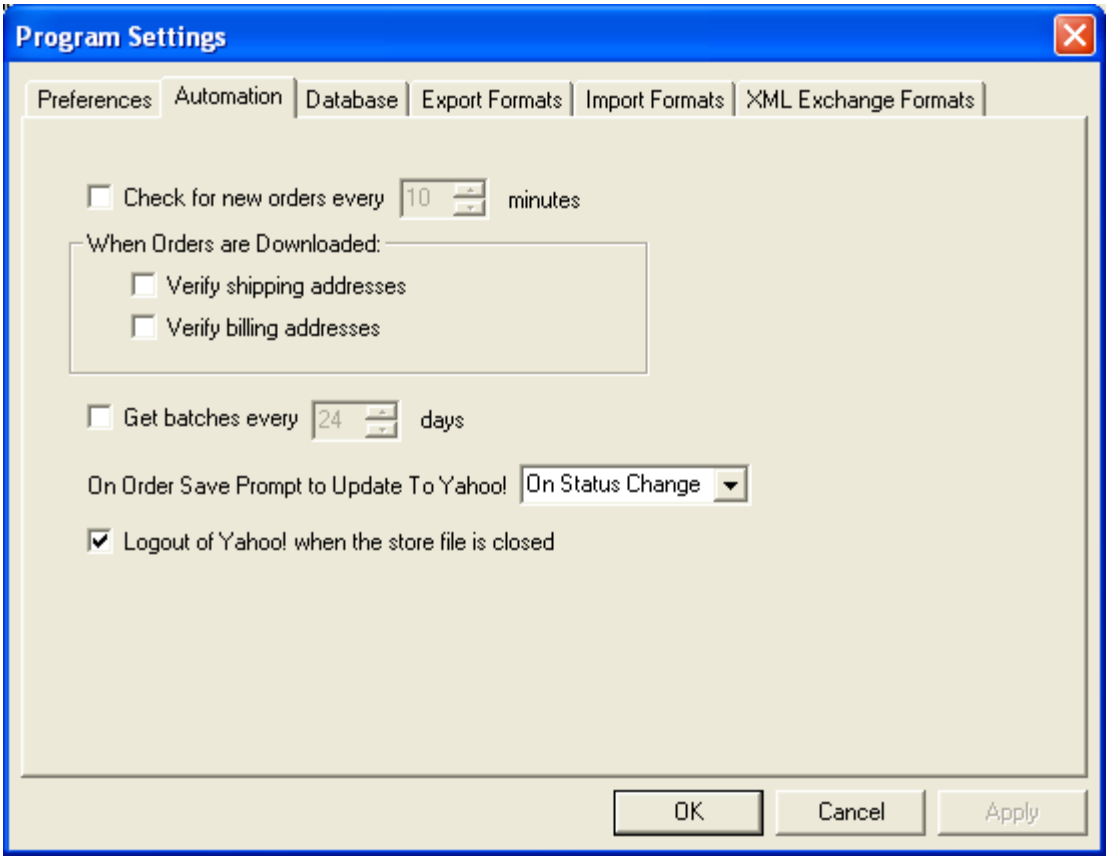


In the Preferences dialog contains the following general application settings:

On Startup Go To	The screen SuperManager should go to each time it is started.
Manual Order Suffix	In SuperManager any orders not downloaded from your store are considered manual orders. Having a suffix after the numerical order ID is recommended to separate it from the downloaded orders and avoid potential duplicate IDs. You can specify the suffix that should be applied to manual orders here.
Suppress shipment number	SuperManager creates a shipment ID for each shipment based on the order ID. For example the first shipment for order 1000 would have the ID 1000-001. If you would like to use the order ID alone for orders with just one shipment check this option. By default it is unchecked so that all shipments have a consistent pattern of ID.

Backordered Item Treatment	SuperManager can handle funds due for backordered items in three ways: • Nothing: Amounts due for backordered items will be considered due even though the items have no yet been shipped. • Subtract from Subtotal: Amounts due for backordered items will be subtracted from the subtotal. • Add Total Line Item: Amounts due for backordered items will be included in the subtotal. Then in a line item below the subtotal they will be subtracted out.
Cutoff Time for Today's Orders	SuperManager offers a separate tab for displaying today's orders. Enter in this setting the time at which one day stops and the next begins. This setting is offered to allow users to enter their close of business, for example, to quickly bring to view the orders that came in after close of business the night before.
Printing Mode	SuperManager offers the ability to have printed reports shown in a print preview window to see the report before printing it, printed using the standard windows print dialog that allows the user to select which printer to print to and number of copies, or printed directly to the default printer.
Copies	When "Print to Default Printer" is selected as the print mode you can enter a number of copies to print.
Collate	When "Print to Default Printer" is selected as the print mode you can check this option to have multiple copies collated.
Electronic Scale	SuperManager offers support for electronic scales. Currently only one scale is supported. If you use a different USB electronic scale and would like to have it considered for inclusion into SuperManager, please contact info@thesupermanager.com.
Import/Export SMX	To facilitate the transfer of import and export formats we have created the "SMX" file type. This file gives the required information to add one or more import and/or export formats. Should you receive an SMX file from SuperWare you can import it to your settings using the import button. Should you desire to send a format to SuperWare or another user, you can do it using the export button.
Save Settings Now	SuperManager automatically saves the program settings each time you exit. For added security, however, you can save the settings at any time using this button to assure that they will be properly saved.
Restore Default Settings	Restores all the program settings to their "factory default" values. This means all changes made to your settings, import or export settings you have added and xml exchange settings will be initialized to their original state.

6.2. Automation

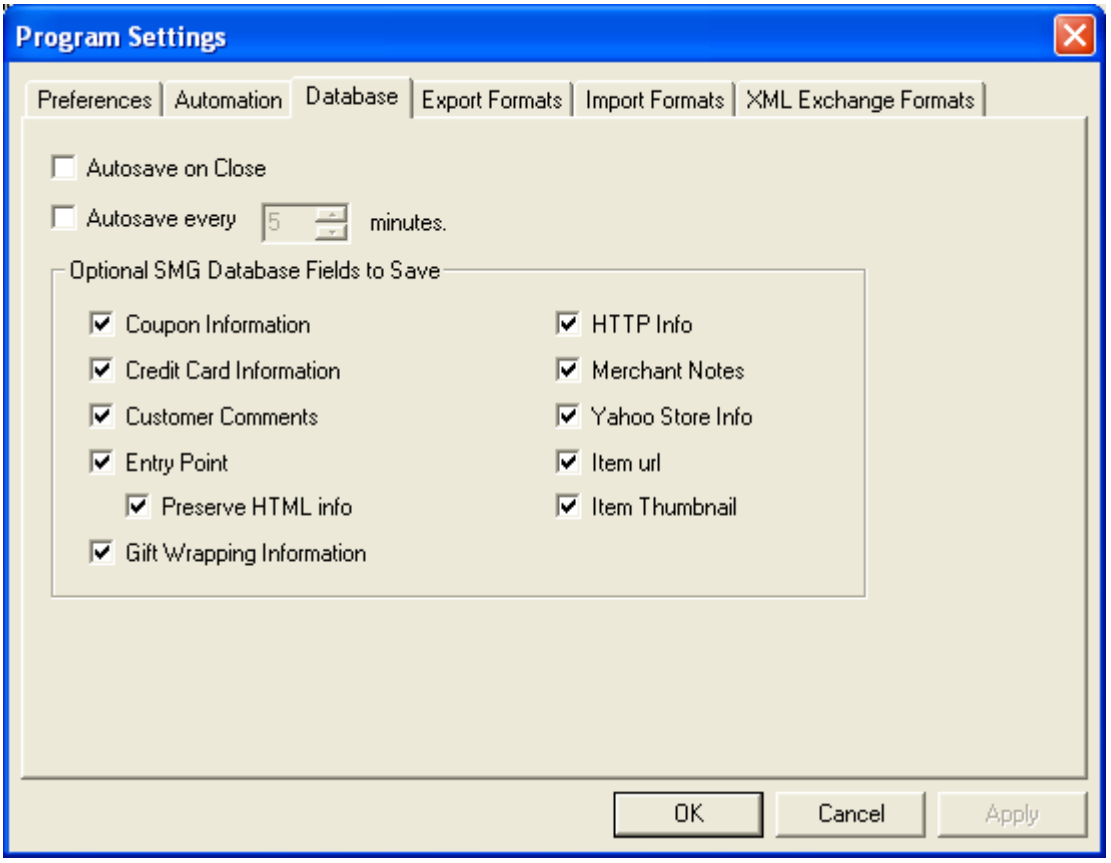


The automation tab contains settings that can allow SuperManager to automatically perform certain tasks on given intervals:

Check for new orders	SuperManager will automatically check for new orders on a given number of minutes interval when this option is selected. When new orders arrive it will alert you that new order(s) have been downloaded.
Verify shipping address	Check this option if you would like SuperManager to automatically verify shipping addresses for newly imported orders. SuperManager contacts US Postal Service databases to check the address for validity and add information as needed to complete the address.
Verify billing address	Check this option if you would like SuperManager to automatically verify billing addresses for newly imported orders. SuperManager contacts US Postal Service databases to check the address for validity and add information as needed to complete the address.
Get batches	SuperManager will also automatically download your merchant batches from Yahoo on a given number of days interval.
On Order Save Prompt to Update to Yahoo!	In the course of managing orders in SuperManager you may make changes to an order that render it “Canceled”, “Fraud”, “On Hold”, etc… When this option is set to “On Status Change” any change made to an order that results in it having a different Yahoo! order status will prompt SuperManager to ask you whether it should update the order in your Yahoo! Store manager. When it is set to “Never” it will never ask this and when set to “Always” it will ask after any change is made to the order.

Log out of Yahoo! SuperManager keeps a Yahoo! Store manager instance at its disposal whenever it is running in case it needs to interact with Yahoo!. When you visit Yahoo!'s site it leaves cookies on your computer to allow it to remember that you were signed in under a given username. This can cause problems for using SuperManager on another store that requires a different username or for logging in using a different username manually. When this option is checked SuperManager will log out when the store is closed or SuperManager is closed in order to not allow Yahoo! to remember the last user that was logged in.

6.3. Database



The database tab offers a few settings concerning when your database is saved and what should be saved in it:

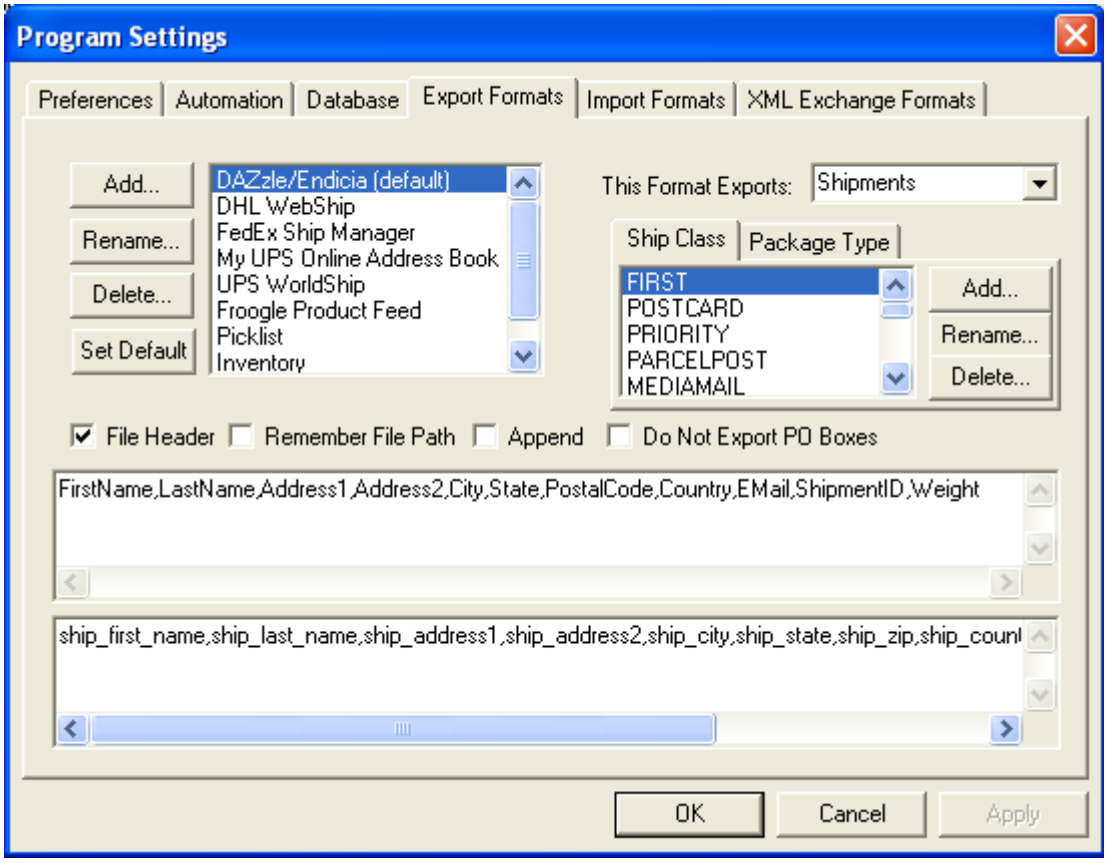
Autosave on Close When this option is checked SuperManager will automatically save the file each time it is closed. Otherwise it will ask you whether it should save the data or not.

Autosave SuperManager will save your file for you on a given interval of minutes when this option is selected. Otherwise you should save your file periodically to prevent loosing data should an unexpected shutdown occur.

Optional fields to Save — Yahoo offers several fields which are either repeatative in nature or viewed as not important to some users. SuperManager will save all of this data unless the corresponding check mark is cleared for them. Generally it is best to keep the file size of your database to a minimum and therefore if there is data that you are not concerned about having it is recommended to remove it from the database.

6.4. Export Formats

You can use the export formats to export your order information to other programs such as FedEx Ship Manager, UPS OnLine WorldShip or DAZzle/Endicia, etc. Four export formats have been included as examples for you to use. You can modify these or add others using the settings described below.



Export List — This list contains all the export definitions in your file. Select one of them to see the settings assigned to it. Use the “Add…”, “Rename…” and “Delete…” buttons to add a new setting, rename or delete the one selected.

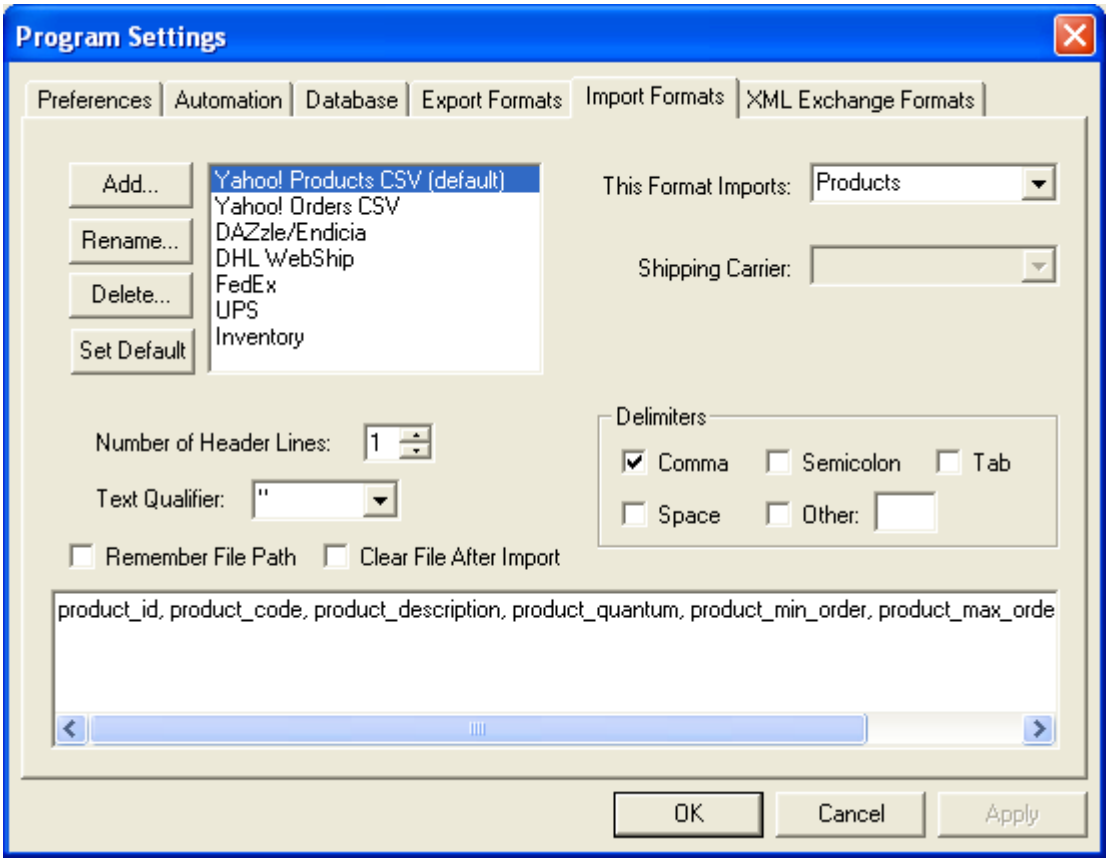
Set Default — Assigns the selected export as the default export. The default export can be automatically exported by using Alt-E. Assign the default export to the one you will be using most often.

This Format Exports — Select the type of data exported by this export format. This can be products, orders, shipments, batches, ranges (of orders), product variants and suppliers. Range exports can be used as summary reports. The export values are the summed up and exported only once, where with order exports there will be one value exported for each order selected.

Ship Classes	This list will be shown only for shipment exports. It contains all the ship classes available for the shipping software you are exporting to. These ship classes must be in the exact (sometimes cryptic) form required by the software package. You will then be able to map your Yahoo! Ship methods to these ship classes in the store settings. Use the “Add”, “Rename” and “Delete” buttons to work with these classes.
Package Types	This list will be shown only for shipment exports. You can get to this list by clicking on the “Package Types” tab above the list. It contains all the package types available for the shipping software you are exporting to. These package types must be the exact (sometimes cryptic) form required by the software package. You will then be able to map your own custom names to these package types in the store settings. Use the “Add”, “Rename” and “Delete” buttons to work with these package types.
File Header	Check this box if the export should have a header line of static text above the exported order, product, shipment or batch information. When this option is checked the box below this check will become active. Enter the file header in this box. When the “Append” option is selected, this line will only be exported the first time the file is created.
Remember File Path	When this option is checked you will be asked for the location to export the file only the first time, thereafter the file will be exported to the same place as previously selected. If at some point you need to change the location the file is exported to you can clear this box, export with this export once, then re-enable it if so desired.
Append	When this option is selected the exported items will be added to the end of the file. When it is not selected the file will be overwritten each time if it already exists.
Do Not Export to PO Boxes	This option is only available for shipment exports. Certain shipping vendors do not ship to PO boxes. This option allows you to choose not to export shipments being sent to PO boxes. The shipments that are not exported will be listed after the export is complete to make you aware that they were excluded from the export.
Box at the bottom	The box is for supplying the export line(s) for each item exported. It should contain one or several SuperManager variables (see section 12.1 for a complete list) you would like to export and should be formatted so that it will be compatible with the program you are exporting to. For example, you can separate the variables with only commas: order_id, order_date or you can separate with commas and quotation marks: "order_id","order_date" or any other format required by the third party software that will be reading the exported file.

6.5. Import Formats

Similarly you can define on the next tab the file formats you need SuperManager to read from third party programs.



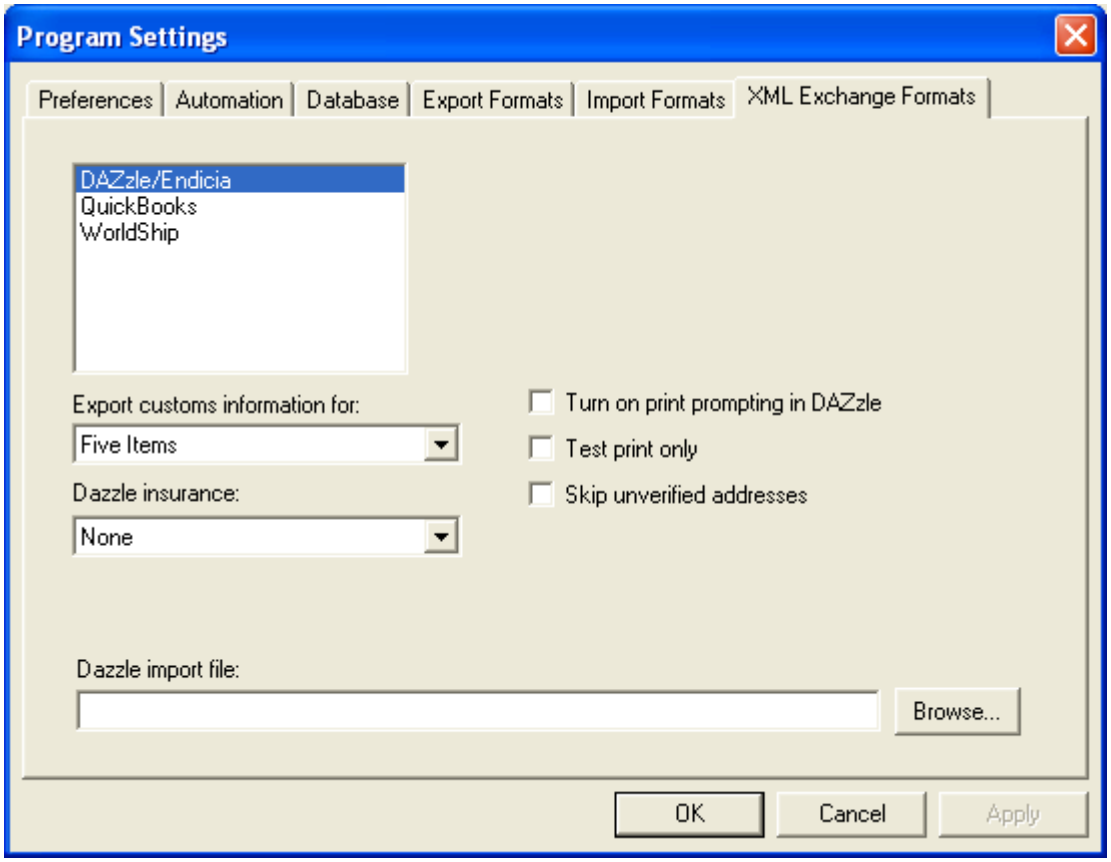
Import List	This list contains all the import definitions in your file. Select one of them to see the settings assigned to it. Use the “Add…”, “Rename…” and “Delete…” buttons to add a new setting, rename or delete the one selected.
Set Default	Assigns the selected import as the default export. The default import can be automatically imported by using Alt-I. Assign the default export to the one you will be using most often.
This Format Imports	Select the type of data imported by this import format. This can be products, orders, shipments, batches, product variants and suppliers.
Shipping Carrier	This option is available only for shipment imports. When files of this import type are imported all the shipments will be set to this carrier type. If none is selected the carrier may be input via a column in the data file or will be left unchanged if it is not in the file format.
Number of header lines	The number of lines at the top of the file format not intended to be interpreted as object data. These lines will be ignored when the file is imported.
Text Qualifier	The character that surrounds text strings. Many .csv formats use quotation marks as a text qualifier.
Remember Path	Select this option if you will always want to import the same file name. If this is selected the first time you import with this format a file will be requested, then subsequent times you use this import a file dialog will only appear if the remembered file path does not exist.
Clear File After Import	Select this option if the third party program you are importing the file from appends to the file each time you export. Each time SuperManager reads the file it will read all the lines in the file. If a third party program just adds to the end of the file each time SuperManager will end up importing information for all the orders ever exported into this file multiple times.

Delimiters	Check any Delimiters that apply. .csv files are comma delimited, thus you would select comma as the delimiter. Other formats are space, tab or semicolon delimited. The SuperManager also allows you to specify any other character as a delimiter.
Box at the bottom	Enter the repeating line of the import format. This will be a list of variables delimited by the delimiters specified. Use the variable skip_field to skip a column of the import file. Note the following nuances about the import format: • When importing orders if no the variable order_id is not included, the next new manual order number will be assigned to the order. • When importing batches the variable batch_number must be included in the format. • When importing shipments the variable shipment_id must be included in the format. This id includes the order number, which must be a valid order number in The SuperManager. • When importing product variants a valid product_code must be provided.

6.6. XML Exchange Formats

The XML Exchange has been included to enable you to easily exchange information with other programs such as DAZzle/Endicia, QuickBooks, QuickBooks POS and UPS WorldShip. These will be discussed in chapter 11.0 “Interfacing with Other Programs”.

6.6.a Dazzle/Endicia



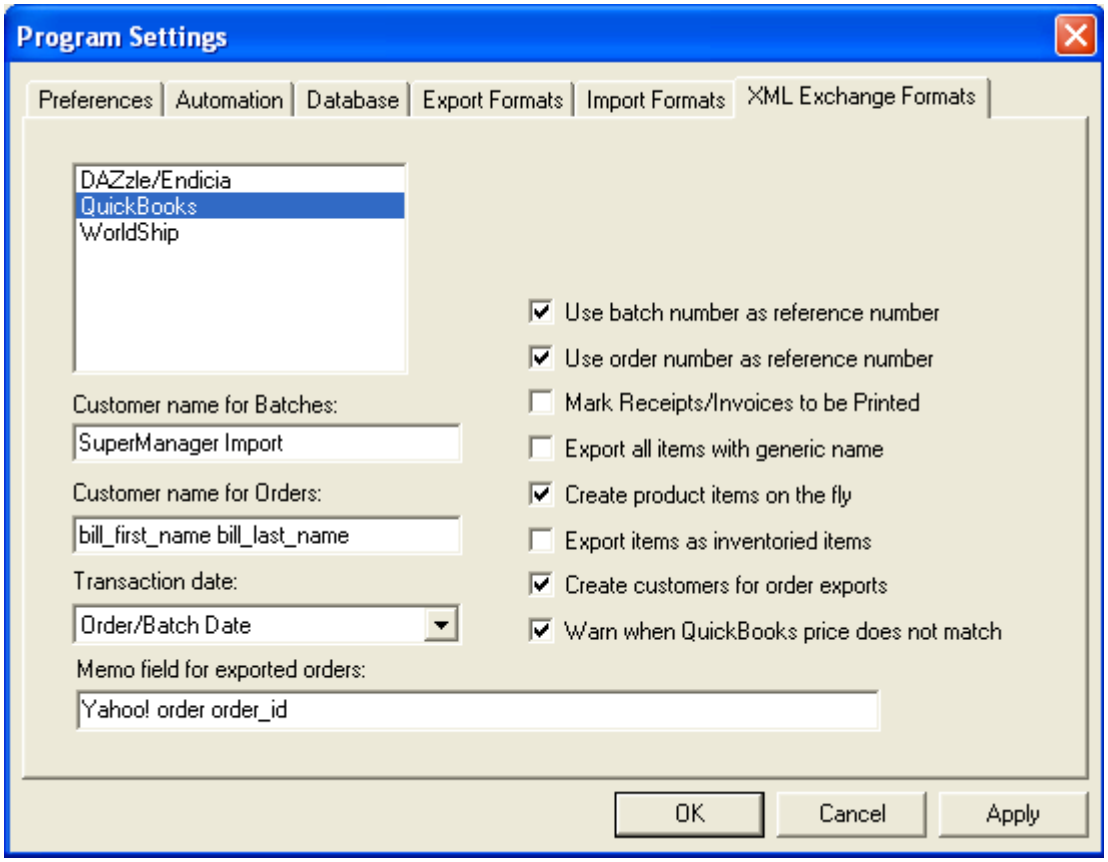
Export customs information for	The number of items that should be identified for customs declaration forms. Dazzle only supports up to five and may crash if more are provided. Therefore it is recommended not to export more than five. Some customs forms templates work well with five items, while others are only designed for 3 items or less. You can also specify to only export item information for international orders.
Dazzle Insurance	Select the type of insurance you use in Dazzle. If “None” is selected no insurance will ever be applied in Dazzle. If one of the insurance options is selected whenever a shipment is marked as “Insured” the type of insurance you select will be added in Dazzle. Note that selecting an insured option will not automatically apply insurance to each package you ship.
Turn On Print Prompting	When this option is checked Dazzle will guide you through a step by step wizard to ship each package. When it is run in this mode, however, many of the instructions, such as template to use, package type and service type may be ignored and tracking numbers will not be returned to SuperManager. When this option is left unchecked all the packages you export will be directly printed and the tracking numbers will be sent back to SuperManager.
Test Print Only	Printing of shipping labels will be run in test mode. The resulting labels will not be usable for shipping packages.
Skip unverified addresses	Addresses that do not verify will be skipped when printing postage.

Dazzle Import File — The XML file SuperManager should create for processing in Dazzle. If you want to use automatic processing of packages in Dazzle this should be in the folder Dazzle is monitoring for incoming XML files. The "DAZzle Import File" is the path and filename of the file The SuperManager should write for DAZzle to read. Before you input the DAZzle import path and filename, you should specify in DAZzle the folder for DAZzle to monitor for incoming XML data:

1. Open DAZzle and then click "Postage" on the menu bar and then click "Options".
2. Click the "Premium Service Options" tab and check the "Monitor this directory for XML files" checkbox.
3. Input a path name (eg. "C:\Program Files\Envelope Manager\DAZzle\xml\") and then click "OK" and then close DAZzle.
4. Now return to The SuperManager, clear the import file box and close the Program Settings dialog if it is open. Reopen the Program Settings dialog and The SuperManager will find the correct DAZzle XML path automatically. Now try to print a test label from The SuperManager.

6.6.b QuickBooks

The QuickBooks settings are applied to both QuickBooks and QuickBooks POS, where applicable.

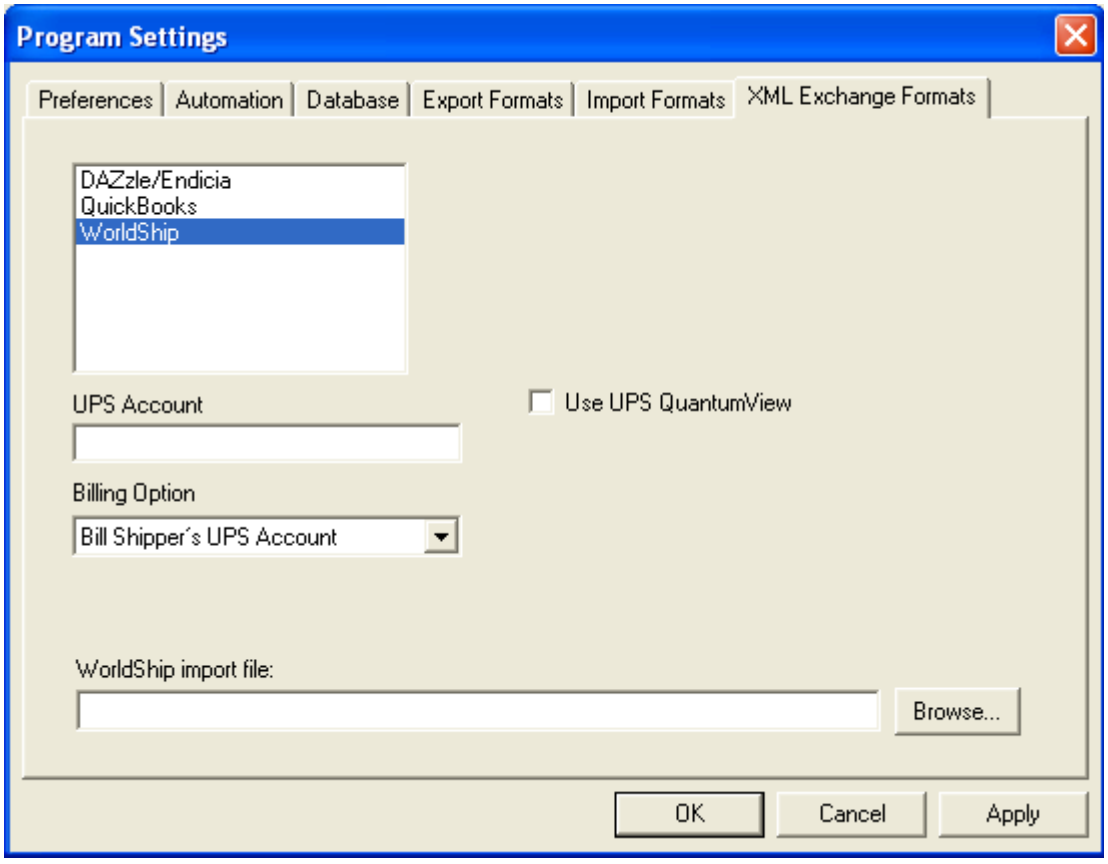


Customer name for Batches	The customer name to be used when exporting batches. Note that any store settings or batches variables can be used in this field. For example you could use “todays_date”, “batch_account” or any other variables as listed in section 12.1.
Customer name for Orders	The customer name to be used for exporting orders if the option “Create customers for order exports” is not checked. As above you can use any store settings or orders variables in this field. If you are exporting orders to QuickBooks POS and are syncing your order information with QuickBooks a good practice is to export orders with the pay method name as the “Customer”. When you do this all the customer information is still populated in the “Ship To” fields, the customer reference is just placed with “MasterCard” for example. You can achieve this by using the variable “bill_method_account” as the customer name.
Transaction date	The date that should be assigned to transactions imported to QuickBooks: • Order/Batch Date: The date the order was received or batch was sumbitted. • Export Date: The date the order or batch was exported from SuperManager to QuickBooks. • Date Funds Were Received: The date the last charge was issued for an order. For batches it is the same as the batch date.

Use batch number as reference number	This dictates whether the SuperManager will set the sales receipt number of the batches it exports to the batch number. If this is checked the batch numbers will appear as “Batch XXXXX”, where XXXXX is the batch number with leading zeros if applicable.
Use order number as reference number	Works similar to the setting for batch number, except the sales receipt/invoice number will simply be the order number
Mark Receipts/Invoices to be Printed	This option dictates whether sales receipts/invoices will be marked as “To be printed” in QuickBooks.
Export all items with generic name	If this option is selected all items in the sales receipts and invoices The SuperManager creates will be linked to an item of name “Item”. If this option is selected and the item does not exist, The SuperManager will create it for you automatically. The descriptions and prices of the items will still appear as they do in Yahoo! and The SuperManager. The item reference will just be made to a single item, thereby avoiding the creation of all the items from your Yahoo! store in your QuickBooks file.
Create products on the fly	When this option is selected items in orders that do not already exist in QuickBooks will be automatically added when the orders requiring them are exported.
Export items as inventoried items	If this option is selected The SuperManager will create all items in QuickBooks and/or QuickBooks POS as inventoried items. Be aware when using this setting that if you create items in QuickBooks as non-inventoried they can be changed to inventoried at a later time, however, it is not possible to change inventoried items to non-inventoried items in QuickBooks. For this reason this option defaults to exporting non-inventoried items.
Create customers for order exports	If this option is selected a new customer will be created for each order you export. If it is not selected the customer name for each order exported will be dictated by what you have defined in “Customer name for Orders”.
Warn when QuickBooks price does not match	This is added as an error checking mechanism. When you export orders the price in the item in the order over-rides the price in QuickBooks. When this option is selected SuperManager will give a warning that the price does not match so you will be alerted that there is a different price in QuickBooks that the item was sold for (which likely indicates a different price in your Yahoo! Store).
Memo field for exported orders	The memo line that should be added to each sales receipt/invoice created by The SuperManager via the orders export. This may also contain variables as demonstrated above.

6.6.c WorldShip

As of WorldShip 9.0 XML is available for direct printing of UPS packaging labels. The following settings dictate how this XML is created.



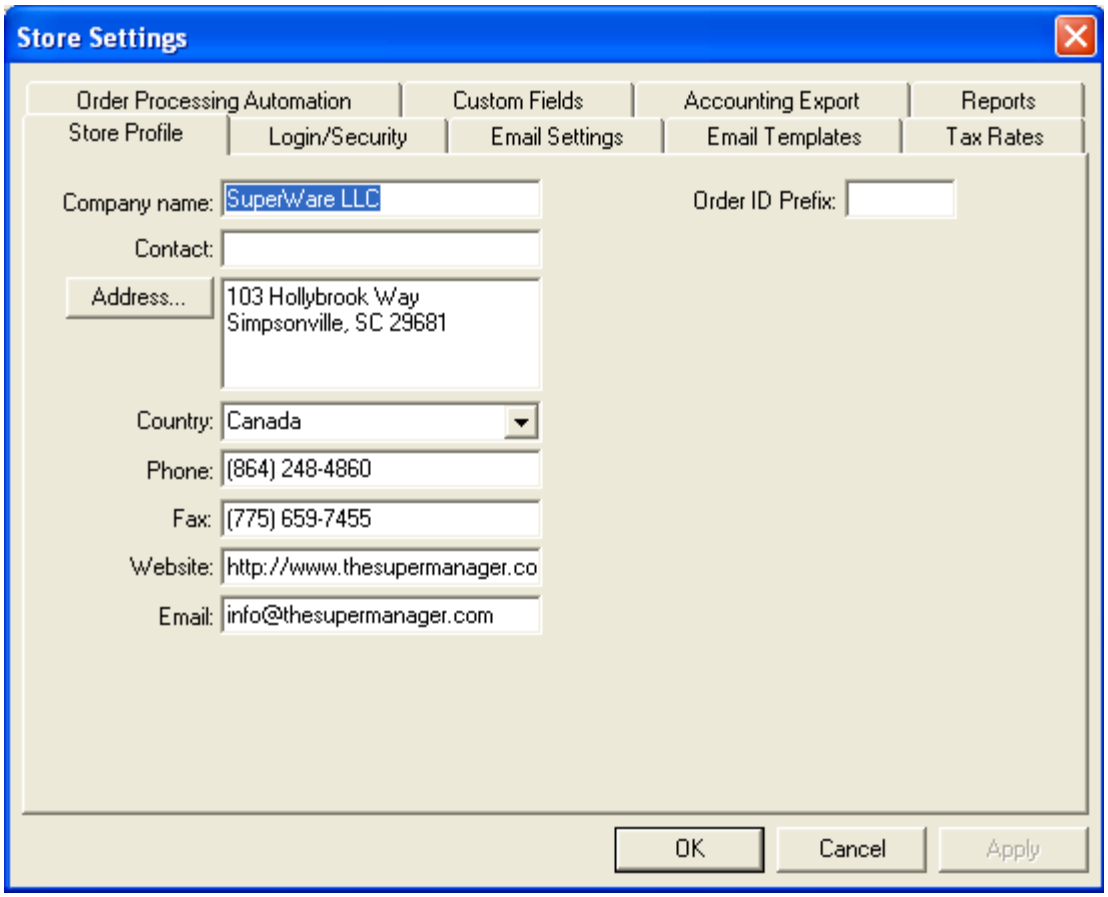
UPS Account	The account number that should be debited for the shipping costs of exported shipments.
Billing Option	The UPS Billing option to be used.
Use UPS Quantum View	Enable Quantum View, which sends emails to shipment recipients to inform them of a package that is on its way. Note that there are multiple ways to inform customers of order/shipment status. WorldShip and Dazzle both offer this, as well as Yahoo, and SuperManager itself. You will probably want to assure that only one of these options is used to avoid sending duplicate information to customers concerning order status.
WorldShip Import File	The path and filename to export the shipment information to. This should likely be in the folder that WorldShip is monitoring for incoming XML files.

7.0 Store Settings / Setup

To begin setting up your store, click "File", then "New" in the Admin Dialog Window. Take your time to familiarize yourself with all the different Store Settings to ensure that you will be able to use The SuperManager to its fullest potential. After you have completed filling in the information, click "OK". Next, be sure to save your changes to your *.smg database file by clicking "File", then "Save As" and chose a name for your *.smg database file. This file will contain your Store Settings, Product Information and your Order information. It can be shared over a network or it can be saved, copied or sent to a colleague to work with. The Store Settings dialog can also be accessed at any time by clicking "View", then "Store Settings" from the Admin Dialog Window.

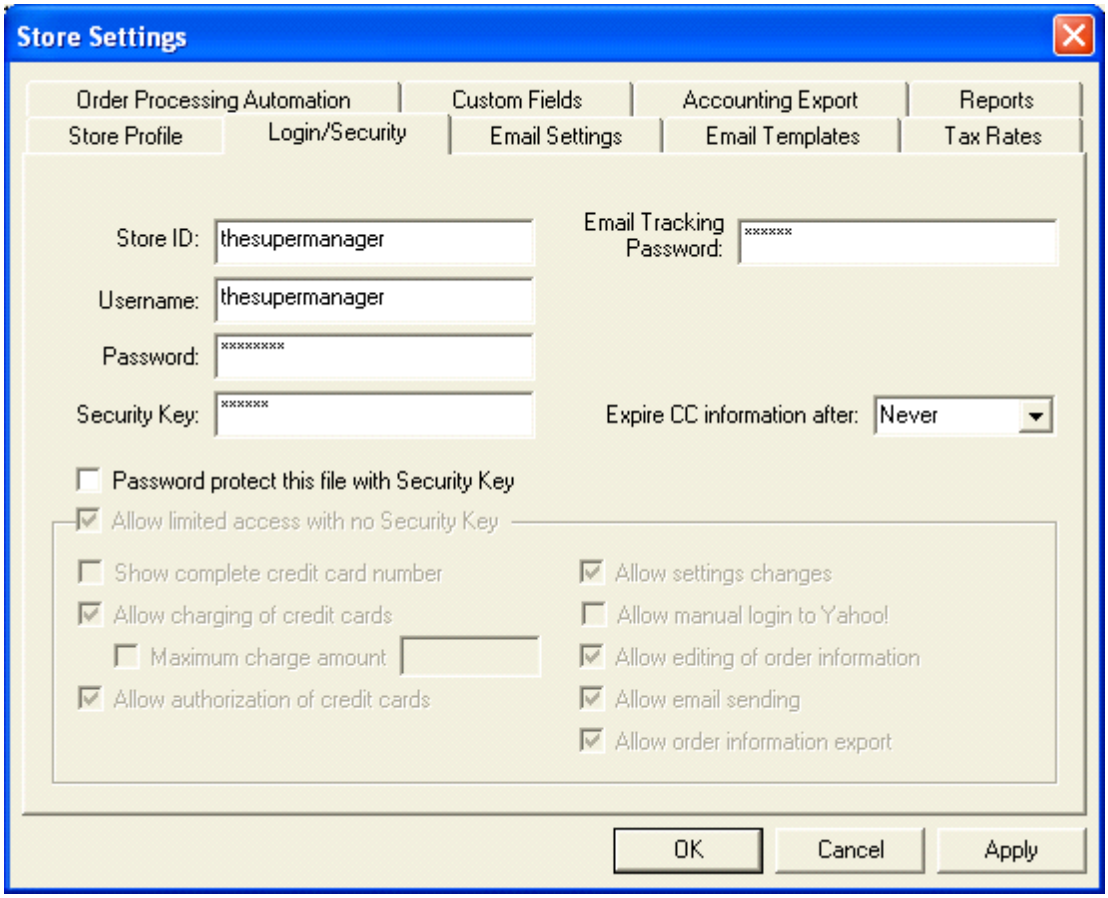
7.1. Store / Company Profile

Enter your store profile/company information here. This information can be added to standard emails or to invoices by utilizing The SuperManager variable list (see section 12.1, The SuperManager Variable List).



Company Name and Contact Information	This information is primarily necessary for filling in company information in email templates and reports.
Order ID Prefix	This is a non-required prefix to prepend to all order IDs from this store. This is primarily provided to be able to distinguish orders from one store from other stores on reports, emails and on the order list.

7.2. Login / Security Information

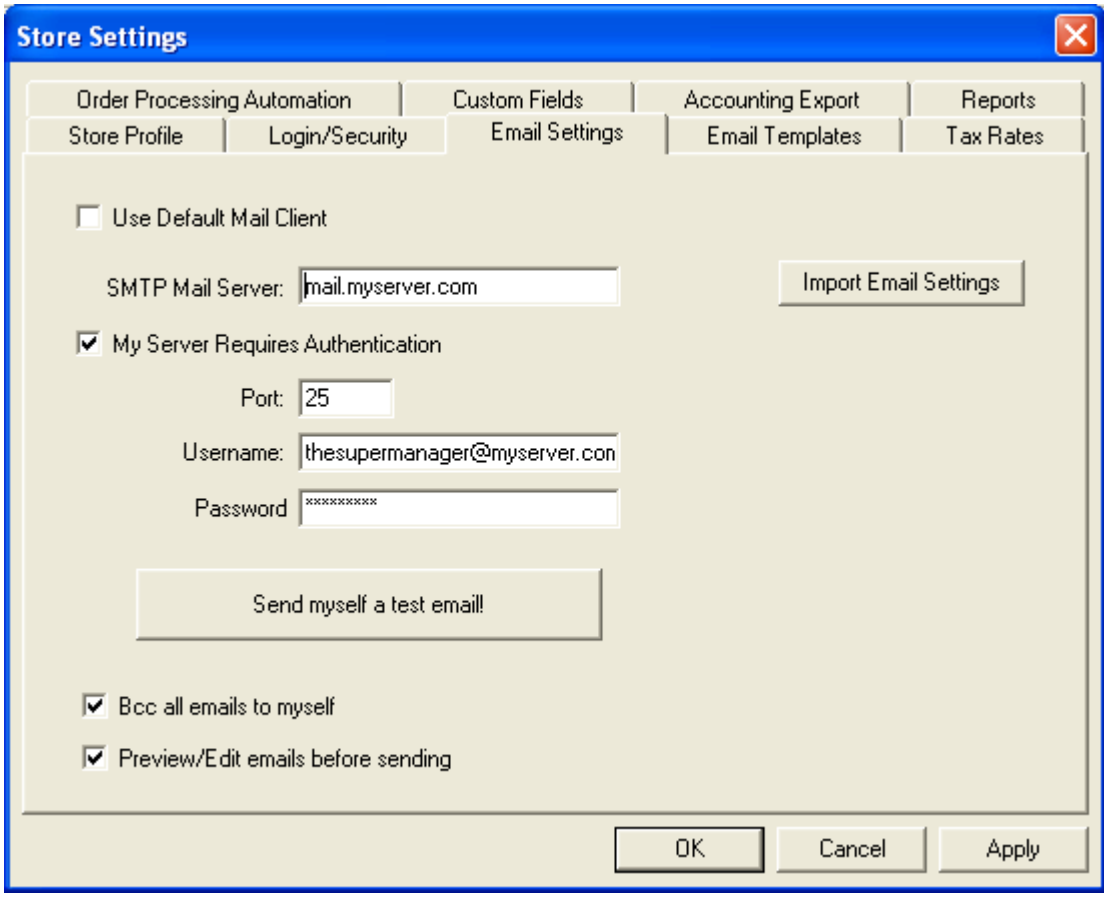


Store ID	This is the store ID assigned to your store by Yahoo!. Store IDs from older stores are typically some variation of the store name, like “thesupermanager”. More recently opened stores are generally in the form “yhst-XXXXXXXXXXXXX”, where the X’s represent a uniquely assigned number.
Username	The username you use to sign into Yahoo small business.
Password	The password you use to sign into Yahoo small business.
Security Key	The security key you use to work in your store manager. **Important Note about Security:** None of these values are ever sent to SuperWare’s servers. SuperWare and its employees and affiliates will have no access to your account information or store in Yahoo!. These values are only used to communicate directly with Yahoo!. The only information SuperManager ever sends to SuperWare servers is the version number of the software you have installed and your license key that was assigned and sent to you.
Email Tracking Password	The password assigned to you by Yahoo! For sending updates through their email order status update server.

Expire CC information after	This feature instructs SuperManager to change credit card numbers to “EXPIRED” after the given number of days. **Important Note:** Once this option has been selected and the file is saved, the credit card numbers are no longer stored in the store database.
Password Protect this File with the Security Key	This option allows you to use the security key to prohibit access to the file.
Allow limited access with no security key	When the protected file is open the user may choose to open the file in limited access mode. When the file is opened in this way the permissions specified in the box below will be given. While logged in with limited access only the allowed permissions will be granted and the user will be unable to change these permissions (and thereby grant themselves access to additional features). When in limited access mode, if the user tries to access a limited feature they will be prompted to enter the security key. At that point the authorized user can grant access on a one-off basis or they can press cancel to cancel the operation.

7.3. Email Settings

Enter your Email Settings here to ensure that you will be able to send emails to customers and to send order shipment status updates back to Yahoo!.

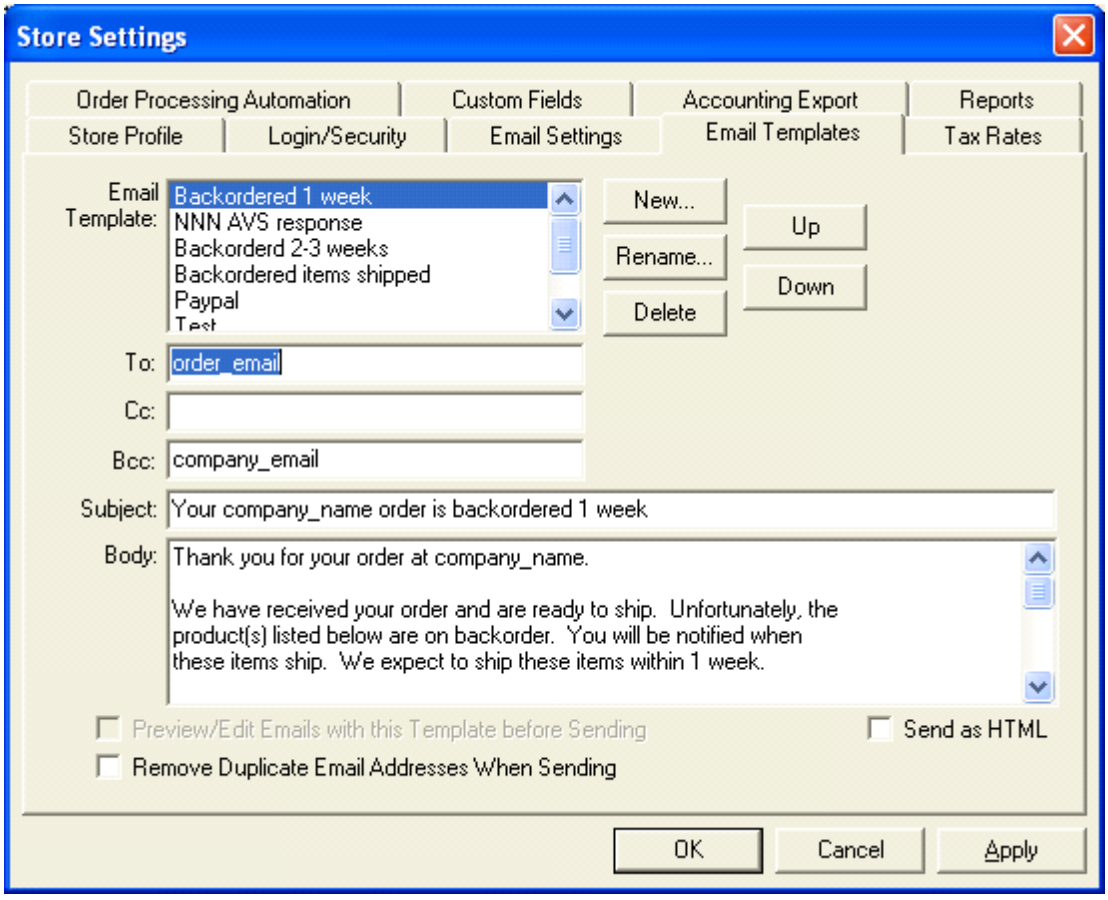


Use Default Mail Client	SuperManager has two mechanisms by which it can send emails. When you enable this option SuperManager will try to send emails through your MAPI supporting email client. If your default mail client does not support the MAPI protocol you will not be able to use this option. Without this option enabled SuperManager will use its internal email sending functions. Either way should send emails to your customers and to Yahoo! Properly. When using the default mail client, however, you will have a 'sent item' stored in your mail client if you have your mail client set to store them.
SMTP mail server	The network address of your mail server. It is recommended to use the server provided by your internet service provider (ISP). Although Yahoo! And other hosting providers may offer an SMTP server for you to use, some ISPs block mail protocol network traffic going out of their network, which may cause problems or completely block the ability to use such servers. The SMTP server you use does not impact the email address the emails are sent from or the resulting email your customer receives. For example you can send an email from server smtp.myisp.net and still have your customers receive it as info@thesupermanager.com.
Import Mail Settings	This button attempts to grab the mail settings from your Outlook Express mail settings. If you do not have accounts set up in Outlook Express this button will not work.
My Server Requires Authentication	Most mail servers require authentication to avoid SPAM violations. Check with your SMTP server administrator to find out if authentication is necessary and if it is the username and password you need to use.

Port	The network port number your SMTP server requires communication to be received on. Typically this is port 25 for non-secure connections. SuperManager does not currently support secure connection SMTP communication. Check with your SMTP server administrator to see if you need to communicate on a port number other than 25.
Username	The username to be used for authentication (if required).
Password	The password to be used for authentication (if required).
Send Myself a Test Email	Press this button once you have entered all the other settings to make sure the settings are correct. SuperManager will send a test email from the email address on the profiles page and to that same address. If SuperManager says the email sends correctly you can monitor your mail inbox to assure that it is received.
BCC All Emails to Myself	Sends a Blind Carbon Copy of each email sent from SuperManager to the email address on the profiles page. This option is especially useful if you are not using the default mail client and would like to have a record of all emails sent in your mail client. **Note:** This option applies even to order status update emails. These are in the somewhat cryptic XML format required by the Yahoo! update server.
Preview/Edit emails before sending	If you do not check this box, emails will be sent to your customers directly based on the email template you have chosen and you will not be able to preview or edit the emails unless you select "Preview/Edit emails with this Template before sending" checkbox in the email template. (See section 7.4 - Email Templates)

7.4. Email Templates

SuperManager sends emails to your customers based on templates you define in this settings page. You can insert field variables into any of the fields of the email. See the list of field variables in Appendix 12.1- The SuperManager Variable List.

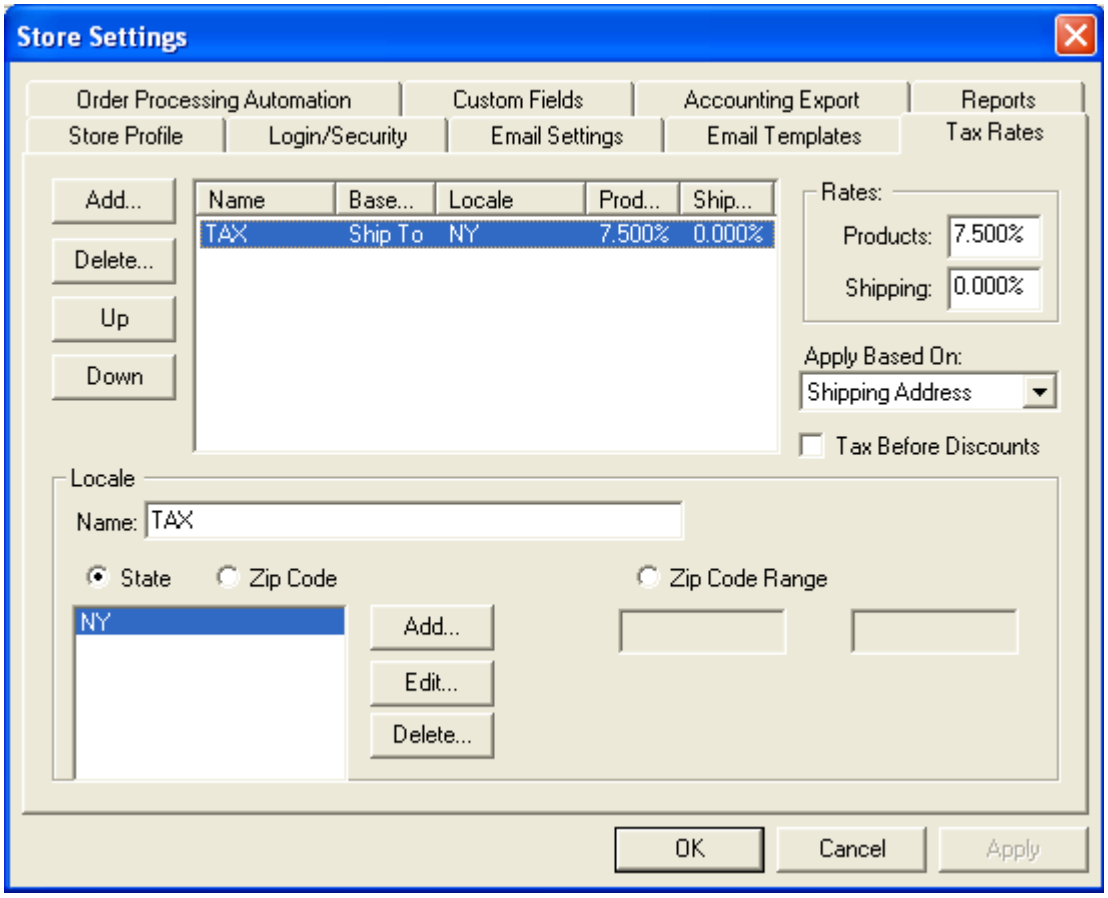


Email Template List	This list contains all the email templates you have defined. You can use the “New…”, “Rename…” and “Delete” buttons to add, remove or rename an email template.
Up/Down Buttons	The order the templates are shown on the list determines the order they will appear on the send email menus. You can move them up or down on this list to put the ones you use most often on the top of these menus.
To	The email address the order should be sent to. This usually will contain the order_email variable, but you could use other variants for example “order_firstname order_lastname [order_email]” will print the customer’s name in the "To" field of most email reading programs. Note that specifying the “To” field in this way makes email templates usable for applications other than sending emails to customers. You do not have to send these emails to your customers at all. Create a drop ship email template based on your drop ship supplier’s requirements and include the items to be drop shipped in the email. You can specify the drop ship suppliers email as the “To:” email. You can also include your email address in the “To:” field to receive a copy. In this and the other address fields you can add multiple addresses separated by semi-colons or commas.
Cc	Any email address(es) you want to Carbon Copy.
Bcc	Any email address(es) you want to Blind Carbon Copy. Blind carbon copied email addresses receive a copy, but the other recipients do not know it has been sent to them.

Subject	The subject of the email. **Tip:** Best practice is to use the field variable company_name to refer to your company. That way you can use the exact same email template for multiple stores.
Body	The body of the email. Note that the body can contain HTML rather than only text. Just create the template in an HTML editor, copy the code and make sure to check the “Send as HTML” checkbox.
Preview/Edit Emails with this Template before Sending	Enable this option to preview or edit emails before they are sent. If this checkbox is grayed out, then you have specified in the “Email Settings” tab to preview or edit all email templates.
Remove Duplicate Email Addresses When Sending	Use this option if you desire that each email in the selected orders when sending the template only receive one copy of the email. This feature is useful for marketing emails advertising specials you are offering, for example.
Send as HTML	Use this option if the body contains html code or you would like the email to be sent with text formatting. Most email reading programs will apply a default text formatting if none is applied using html tags.

7.5. Tax Rates

Specify your Tax Rates here. You can enter zip code ranges or just specify a generic tax rule by state. You have the option to specify a different tax rate for products and shipping.



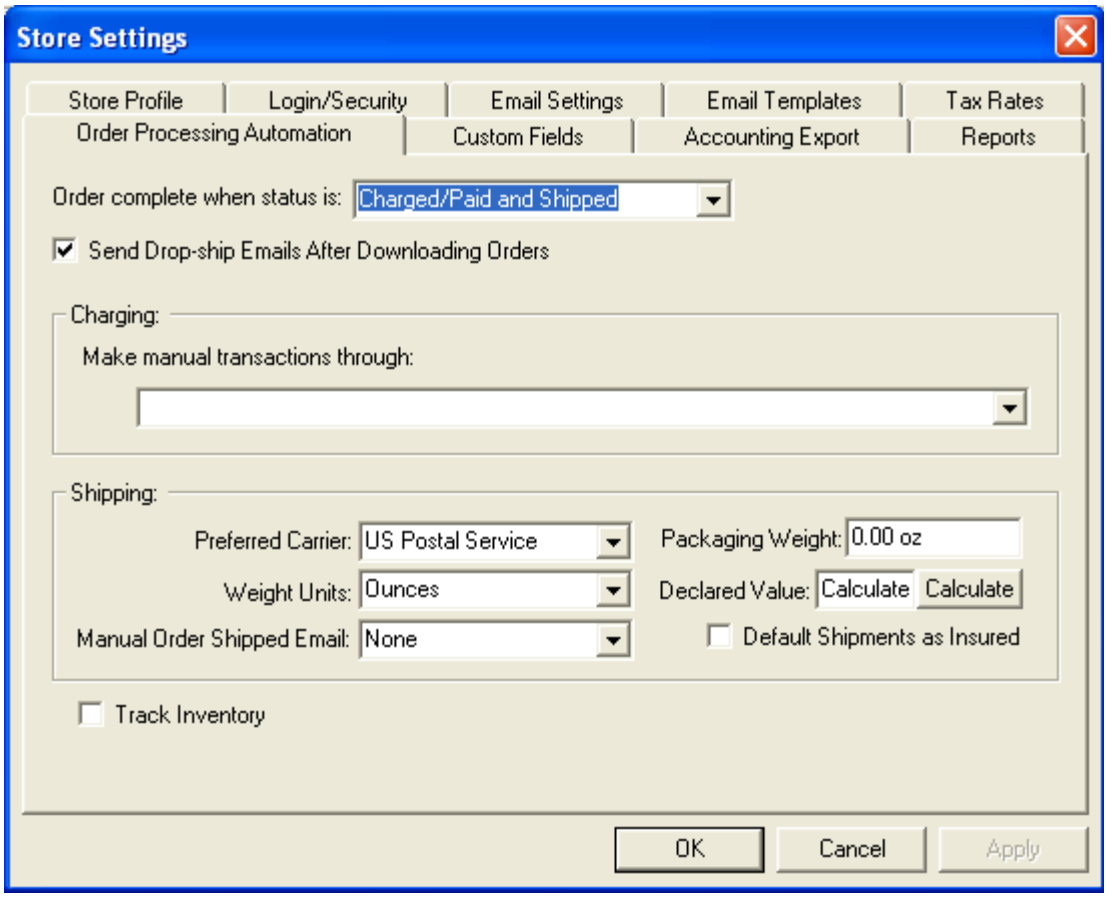
Tax Rate List	SuperManager can manage several tax rates. You can use the "Add…" and "Delete…" buttons to add or remove them. **Note:** No taxes will be calculated on a downloaded order unless changes are made to it and you agree to re-calculate the taxes when it prompts for your approval. Without such a warning appearing, taxes will be kept at the values set by the Yahoo! Shopping cart.
Up and Down Buttons	SuperManager will only apply one tax rate to each order. It is therefore, necessary to have the tax rates defined in order of precedence. For example if there are specific zip codes that have a tax rate higher than the default state tax you must have those higher on the list than the default state tax that applies to all other zip codes in the state. The "Up" and "Down" buttons are for ordering tax rates in this manner.
Rates	The tax rate that should be applied to products and shipping.
Apply Based On	Most states require taxes to be applied based on the shipping address. This setting is offered for versatility.
Tax Before Discounts	Most states instruct you to base tax amounts on the post-discount total. This settings is offered for versatility.
Name	This name is shown on the list above for convenience in working with the various tax rates. It is also used as the tax code in QuickBooks Point of Sale (not QuickBooks). See section 11.2 for more information about interfacing with QuickBooks Point of Sale.

State/Zip Code/Zip Code Range

These three options are available for identifying the range of application for a tax rate. You can use any combination of them to completely define the range of applicability. Use the “Add…”, “Edit…” and “Delete” buttons to add applicable areas to the selected tax rate.

7.6. Order Processing Automation

Use this dialog to tell SuperManager a little bit about your process.



Order complete when status is

This setting dictates what orders are shown in the “Open” and “Closed” tabs on the order list.

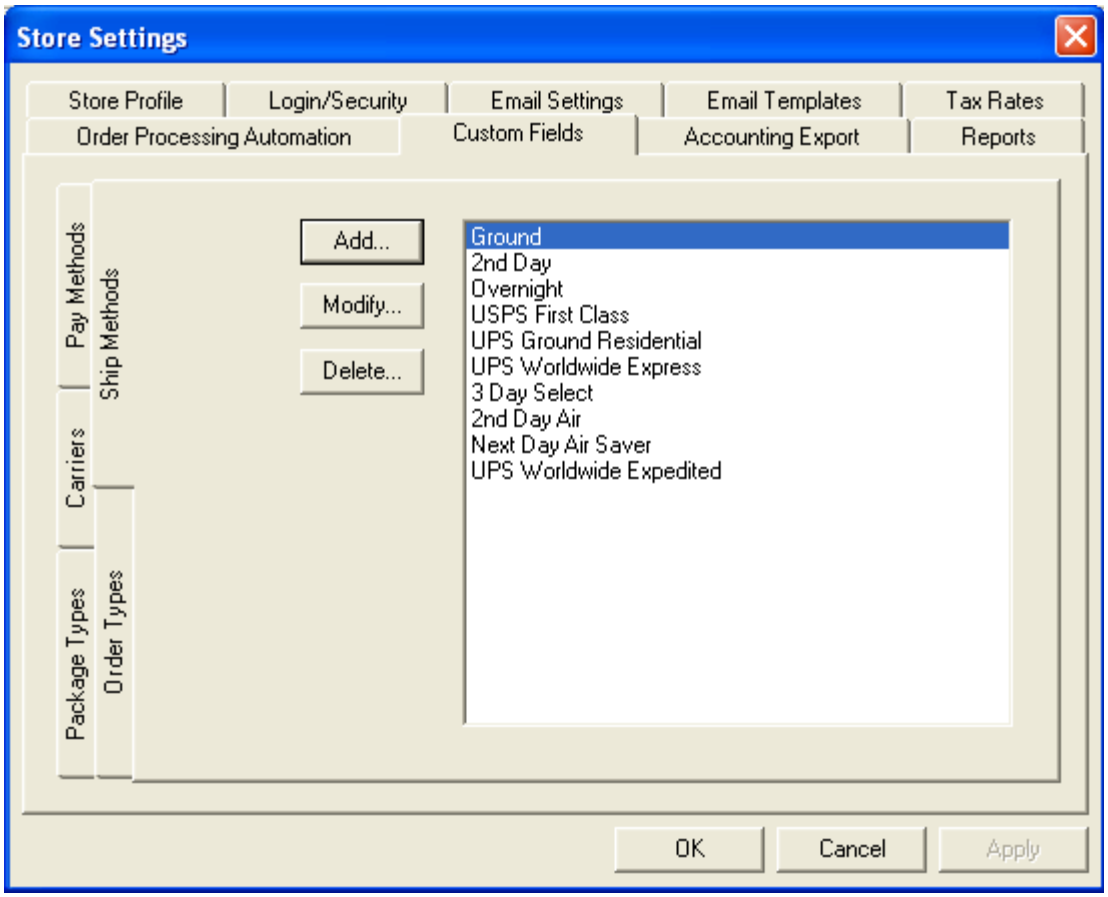
Send Drop-ship Emails After Downloading Orders

This is the first of several settings that have to be in place for sending drop-ship emails for items in orders that are downloaded. After enabling this option you have to create product variants and set the drop-ship flag and supplier for those variants that you want to have drop-ship emails sent for. The supplier must also have an email template selected to use for sending drop-ship emails.

Make manual transactions through	If you have more than one merchant account you use with Yahoo! specify which one should be used for your manual transactions here. The account used for standard transactions needs to be specified in your Yahoo! store manager. This setting will only apply to manual transactions. If you have only one account this setting is not essential. If you have more than one account, but not all of them show up in this dropdown, run the “Get Batches” or “Submit Batches” function first to initialize this data from Yahoo!. See section 10.0 to find out how to do this.
Preferred Carrier	This is the carrier that all shipments will be initialized to when new orders are downloaded, manual orders are created and new shipments are added to orders. This can be changed on a shipment-to-shipment basis, but this is the default value.
Weight Units	Yahoo! weights are unitless. The SuperManager is able to import and export in pounds, ounces, grams or kilograms. This setting tells The SuperManager how it should interpret the weights it receives from Yahoo!. These will then be converted to whichever weight you request when you import or export to another program. The SuperManager also uses this setting to determine what weight should be assumed if none is given and what units of weight should be displayed in on the dialogs.
Manual Order Shipped Email	When you add tracking numbers to shipments SuperManager will ask if you would like to send shipment information updates to your customer(s). If you choose to do so or manually request SuperManager to send shipping updates SuperManager will send the status update to Yahoo! If the tracking password has been filled in. If the tracking password is left blank or for non-Yahoo! Orders SuperManager will send this email template to each customer.
Packaging Weight	The SuperManager helps you get a good estimate of the weights of each shipment. By default shipment weights are calculated as the sum of the product weights within the shipment plus this default packaging weight. Weights can be entered individually for each shipment or by using an electronic scale.
Declared Value	SuperManager will apply this declared value to shipments. If you enter a dollar amount it will be applied to each shipment. If you press the “Calculate” button SuperManager will calculate the declared value based on the sum of the products in the shipment. You can then change each shipment to whatever value you like in the shipment details screen.
Default Shipments as Insured	This setting dictates whether shipments default to insured or non-insured. The value can be changed for individual shipments on the shipment details screen.
Track Inventory	Check this option if you want to track inventory in SuperManager. Once enabling this option you will also need to create product variants since it is at the product variant level that inventory is tracked. This will be discussed in section 9.0 - Products.

7.7. Custom Fields

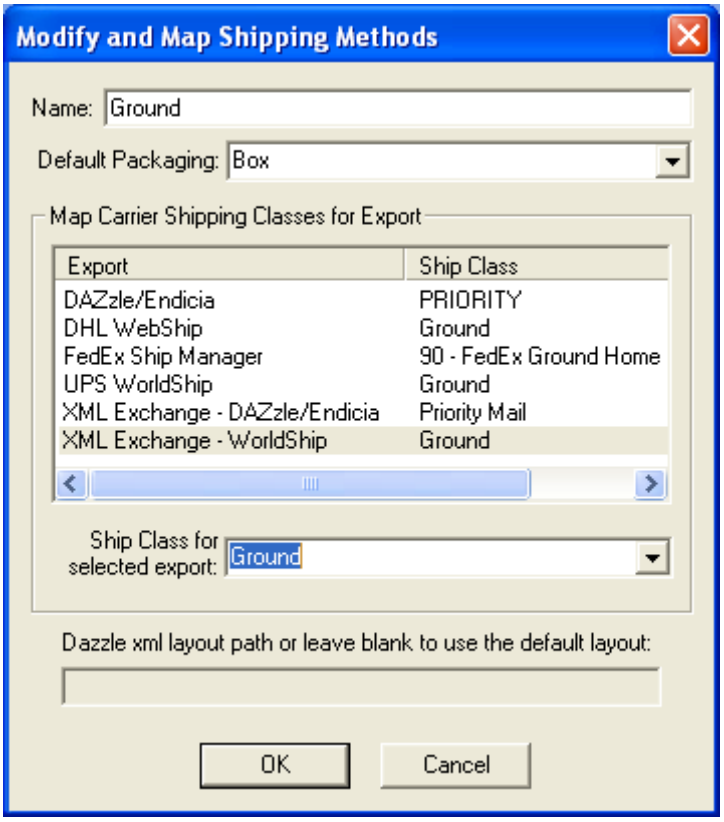
This dialog allows you to set payment and ship methods as they are set in the Yahoo! store manager, specify order types to be assigned to manual orders created offline, and keep a set of carriers and packaging types to be used in shipping orders. Payment and shipping methods will be added to this list as new ones are encountered in the orders The SuperManager downloads. They will also be added when you run the "Update Products" function described in section 9.1. Order types, carriers and packaging types are not stored in Yahoo!. They are unique to The SuperManager.



The list will display the list of items selected in the tabs at the left. Use the "Add…" and "Delete…" buttons to add or delete items from the list. When you delete an item The SuperManager will prompt you for a pay method, ship method or order type to move all orders containing this method/type with. The "Modify…" button allows you to change the name of an order type or Pay Method and give you other additional settings for some of the custom fields as described below.

7.7.a Shipping Methods

To accurately export your orders to your shipping software, you will need to map each of your Yahoo! shipping methods to each carrier shipping class you will be using for that specific shipping method. To open the "Modify or Map Shipping" dialog, first click the "Shipping Method" tab and then double click on the Yahoo! shipping method or select the shipping method and then click the "Modify" button. After filling in these settings when you select orders on the order list and export them using a text export format the settings from this dialog will be used to determine how to replace the variable shipment_shipping_class.



Name — You may change the name of the ship method here. Any changes made here will not, however, change the settings in your Yahoo! Store manager.

Default Packaging — The packaging to initialize shipment packaging types for orders of this ship method with. You can then change the packaging type for each shipment individually on the shipment details screen.

Map Carrier Shipping Classes for Export — These are the shipment export formats you have entered using the directions in section 6.2 and the XML Exchange formats offered natively in SuperManager. Once you select a carrier the shipping classes entered for this export format (again see section 6.2) will appear in the "Ship Class for selected export" dropdown. You can specify "Do not export with this format". If this is selected when you select an order containing this ship method and export it with this format, the order will not be included in the export. If you select "None selected" the shipment_shipping_class variable will be left blank.

Note: The XML Exchange items on this list always appear and are the settings for XML files exported. The other items on the list are the export formats you have defined in your program settings. If you intend to use XML make sure you select these entries rather than the text exports for DAZzle or WorldShip that may exist in the top of the list.

Dazzle xml layout path — This option only applies to the "XML Exchange – DAZzle/Endecia" shipping export. You must select this item from the list above to be able to set this setting. In it you should enter the path to the Dazzle layout that should be used for this shipment method.

7.7.b Pay Methods

As mentioned above, pay methods are added from your Yahoo! Store settings when you download orders or products. As with ship methods, their names can be changed in SuperManager, but this will not affect your settings in your store manager.

7.7.c Order Types

In general order types are for specifying how offline orders are received. You can include such types as fax, phone and email to distinguish how your orders are received. By default the order type for downloaded orders is "eStore". This type may not be deleted, but the name may be changed if you so desire.

7.7.d Carriers

The carrier list allows you to specify which carrier was used to ship shipments in SuperManager. Addidionally carriers have a few additional settings that can be set/modified on the details screen below. To get to this screen double click on the carrier you want to view/modify or select it on the list and click "Modify…"

Name — Changes the name as it will appear on the carrier list and the select box on the shipment details screen.

Type — Three carriers are supported for the order status update system in Yahoo!: US Postal Service, UPS, FedEx and DHL (includes former Airborne). When the order status update is sent the type is used to determine which vendor Yahoo! Is informed it was shipped through.

Tracking URL — This format will be used for tracking within the SuperManager and sending links using the shipment_tracking_url field variable. You should use the shipment_tracking_id or other field variables where they belong in the url.

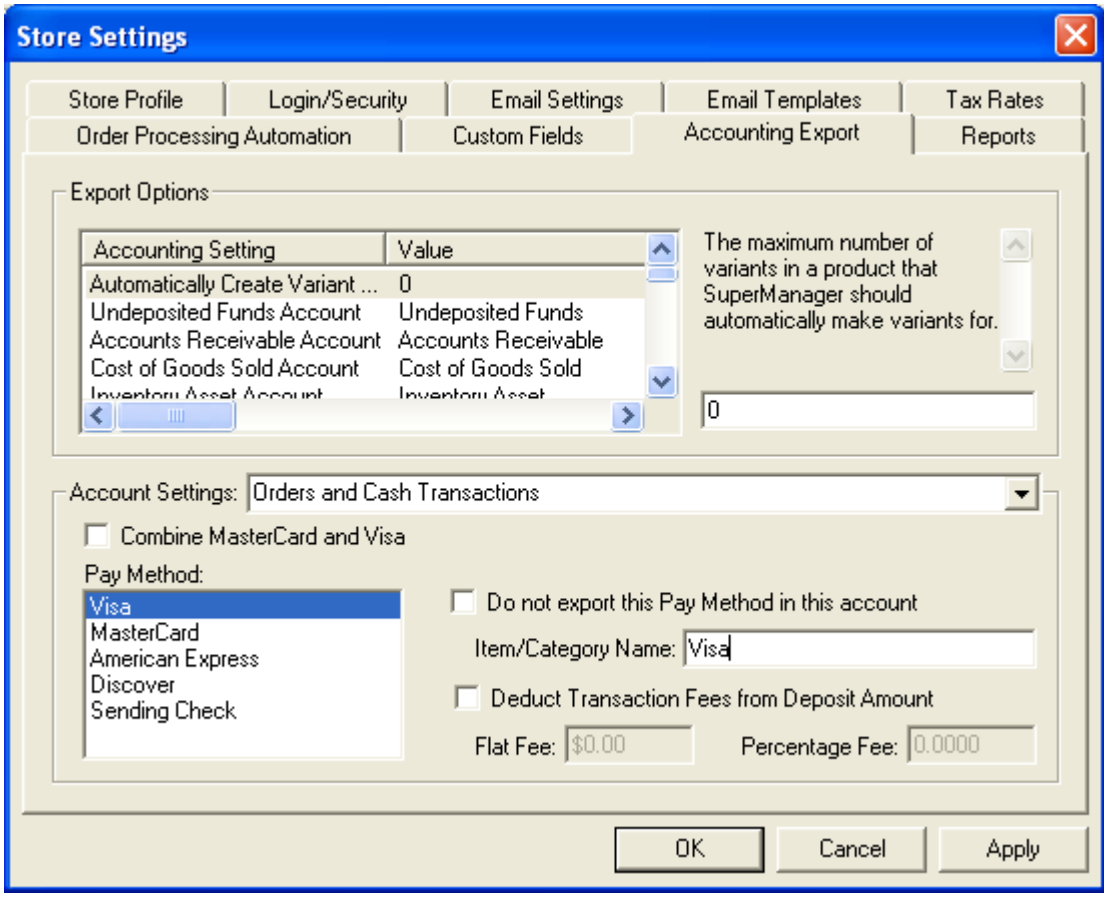
7.7.e Packaging Types

A packaging type list is also available to declaring the packaging type used to ship shipments in SuperManager. More particularly, this list serves primarily as a user friendly name an categorization of the often times not-so-user-friendly names required by 3rd party shipping programs. For example, DAZzle uses the name "RECTPARCEL" to represent a box. The package type list allows you to assign a user friendly name "Box" to mean "RECTPARCEL" when a DAZzle file is exported and "UPS Box" when you export to WorldShip and so on. You can view and change the details of the package types by double clicking on a type on the list or selecting one and clicking "Modify…". When you do the following details screen will appear.

Name	Changes the name as it will appear on the package type list and the select box on the shipment details screen.
Map Carrier Package Types for Export	These are the shipment export formats you have entered using the directions in section 6.2 and the XML Exchange formats offered natively in SuperManager. Once you select a carrier the package types entered for this export format (again see section 6.2) will appear in the "Package Type for selected export" dropdown. You can specify "Do not export with this format". If this is selected when you select an order containing this ship method and export it with this format, the order will not be included in the export. If you select "None selected" the shipment_package_type variable will be left blank.

7.8. Accounting Export

Use the Accounting Export settings Dialog to specify how you would like to export your transactions to your accounting software.



Export Options: When you export batches or orders to accounting software the category/item names assigned to different transaction line items will come from this dialog. You need to make sure that there are corresponding categories or items in your accounting software to receive the category or item name given here. For more information about exporting to accounting software see section 10.1.

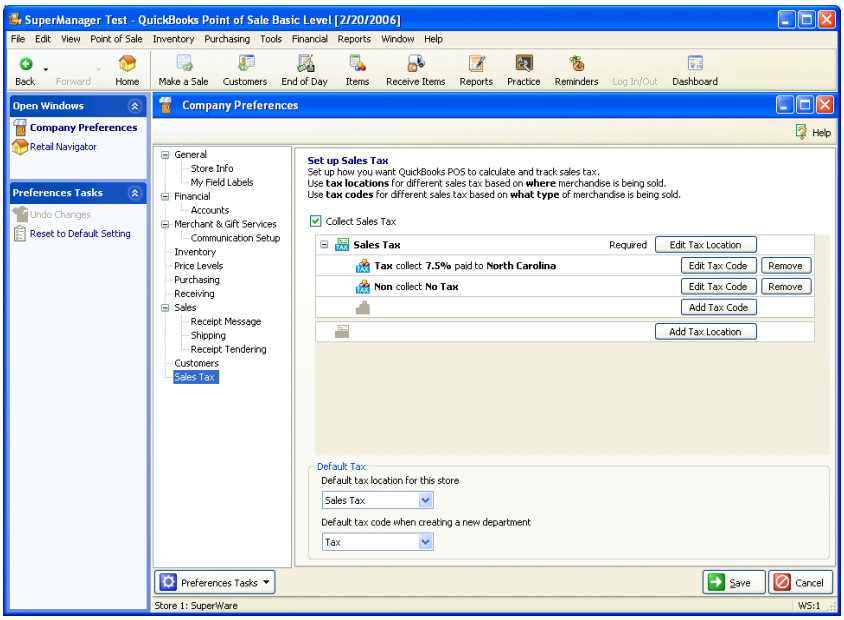
Automatically Create Variants	When this option is greater than zero SuperManager will create new variants underneath products up to the amount you enter here. This relates to QuickBooks, but is not exclusively for interfacing with QuickBooks. Variants store alternative product codes that can be used to give QuickBooks or QuickBooks POS item names if they do not match the default SuperManager item names (i.e. *product_code*:*variant_name*). They are also, however, used for storing inventory levels. If you are exporting to QuickBooks on a variant level or are tracking inventory in QuickBooks you will want to set this value to a reasonable threshold. You may have products with thousands of options that you do not intend to track in the same manner and the number you should choose should be low enough to filter out such products.
Undeposited Funds Account	If this account is left as “Undeposited funds” the amounts received in each order will be deposited to undeposited funds. You can then claim the money in this account by making a deposit in QuickBooks. If you want money collected through your orders to deposit to some other account you can set this account here. If this account is a sub-account you will need to give the full name of the account by in the form “*<Parent Account>* : *<Sub-account>*”.

Accounts Receivable Account	The name of your accounts receivable account as described above. If this account is a sub-account you will need to give the full name of the account by in the form "<*Parent Account*> : <*Sub-account*>".
Cost of Goods Sold Account	The name of your cost of goods sold account as described above. If this account is a sub-account you will need to give the full name of the account by in the form "<*Parent Account*> : <*Sub-account*>".
Inventory Asset Account	The name of your inventory asset account as described above. If this account is a sub-account you will need to give the full name of the account by in the form "<*Parent Account*> : <*Sub-account*>".
Taxable Sales Account/Item	The name of your taxable sales account as described above. If this account is a sub-account you will need to give the full name of the account by in the form "<*Parent Account*> : <*Sub-account*>". This setting is also used as the item name for the sum of your taxable sales for batches exported from The SuperManager. If this item does not exist in QuickBooks it will be created.
Nontaxable Sales Account/Item	The name of your nontaxable sales account as described above. If this account is a sub-account you will need to give the full name of the account by in the form "<*Parent Account*> : <*Sub-account*>". This setting is also used as the item name for the sum of your nontaxable sales for batches exported from The SuperManager. If this item does not exist in QuickBooks it will be created.
Shipping Item	The name of the item to be used for shipping fees collected from your customers. If this item does not exist it will be created.

Tax Item

QuickBooks: The name of the item to be used for sales taxes collected from your customers. If this item does not exist in QuickBooks it will be created.

QuickBooks POS: This field must contain the name of the "Tax Location" SuperManager should use. To determine the proper name of your tax location in POS go to "Edit" | "Preferences" | "Company" from the main menu. A screen similar to the one shown below should appear



In this example "Sales Tax" is the name of the tax location. Your settings may have several tax locations setup. SuperManager is only able to work with one tax location for doing all of its exports. You may need to create a new location just for exporting orders from The SuperManager. Underneath this tax location in POS you need to have one "Tax Code" for non-taxable items (for example those that are purchased by out of state customers) and one for each tax rate that you have defined in The SuperManager. This will be further discussed later.

Tax Reference Item

The name of the item to be linked to each sales receipt/invoice as the "Tax" field. If this item does not exist in QuickBooks it will be created.

Gift Wrap Item

The name of the item to be used for gift wrap fees collected from your customers. If this item does not exist in QuickBooks it will be created.

Discount Item

The name of the item to be used for discounts given to your customers. If this item does not exist in QuickBooks it will be created.

Adjustment Item

The name of the item to be used for adjustments made to order totals. If this item does not exist in QuickBooks it will be created.

Coupon Item

The name of the item to be used for coupons applied to orders. If this item does not exist in QuickBooks it will be created.

Gift Certificate Item

The name of the item to be used for gift certificates applied to orders. If this item does not exist in QuickBooks it will be created.

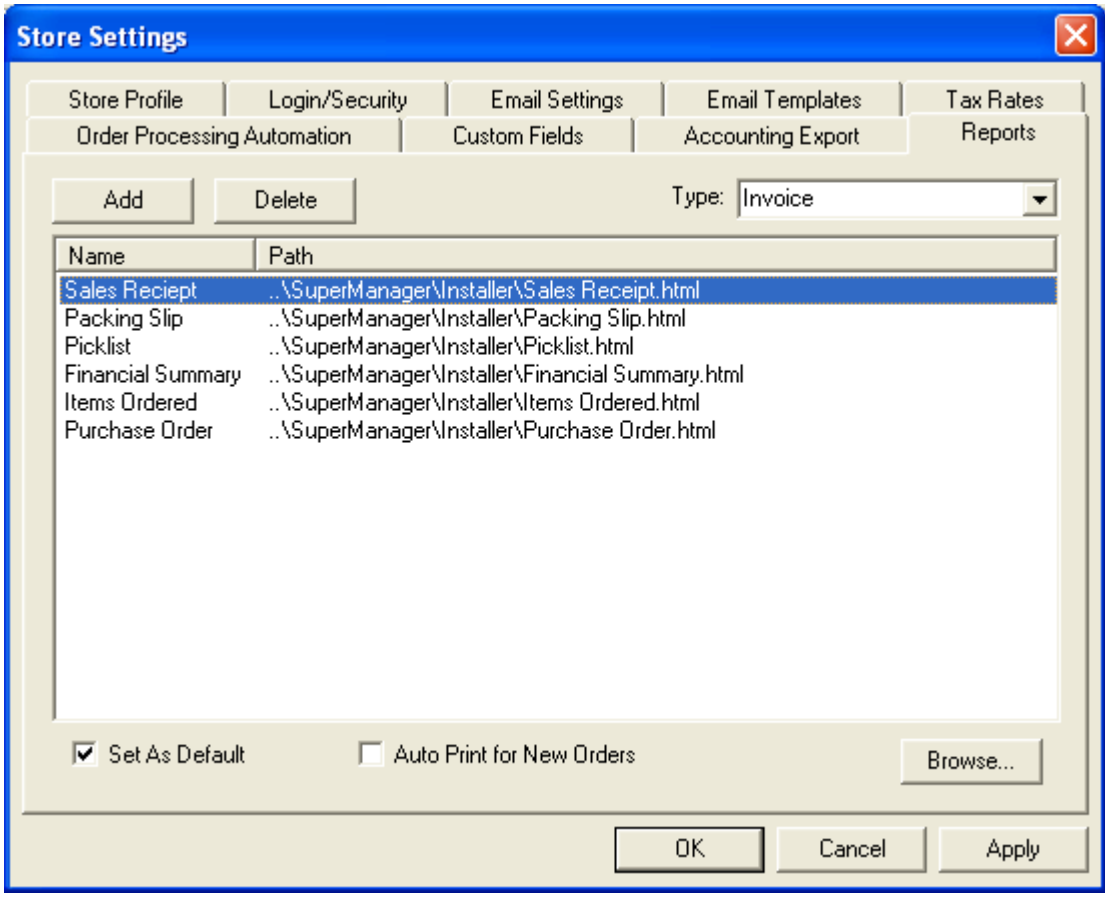
Credit Item	The name of the item to be used for credits applied to orders. If this item does not exist in QuickBooks it will be created.
Fees Item	The name of the item to be used for merchant fees subtracted from batches. If this item does not exist in QuickBooks it will be created.
Taxable Tax Code	**QuickBooks:** The 3 letter code for taxable line items. If this tax code does not exist in QuickBooks it will be created for you. **QuickBooks POS:** This is the name of the "Tax Code" that should be applied when sales tax is due on an item or order.
Nontaxable Tax Code	**QuickBooks:** The 3 letter code for nontaxable line items. If this tax code does not exist in QuickBooks it will be created for you. **QuickBooks POS:** This is the name of the "Tax Code" that should be applied when no sales tax is due on an item or order.
Shipping is Taxable	Determines whether shipping costs will be marked with a taxable or nontaxable tax code.
Export Orders As	Allows you to set whether orders will be exported as sales receipts or invoices in QuickBooks
QuickBooks File Path	The full path of your QuickBooks file. If this field is left blank you will need to have QuickBooks open with the proper file loaded to export information. WARNING: If the field is blank and you have QuickBooks open to another store when you export objects they will be created in the file that you have open. This field can be left blank.
QuickBooks Class	The class to be associated with each order exported to QuickBooks. This field can be left blank. May contain any of the store settings variables or order variables when exporting orders and batch variables when exporting batches.
QuickBooks Sales Rep Initials	The initials of the sales rep to be associated with each order exported to QuickBooks. This field can be left blank. May contain any of the store settings variables or order variables when exporting orders and batch variables when exporting batches.
QuickBooks POS Server:	The network name of the machine on which the POS server is running. This should match the settings you had to enter to your client workstations if you are running POS on a network with more than one workstation.
QuickBooks POS Company:	The name of the "company data" you want to connect to. This name should appear before " – QuickBooks Point of Sale…." On the title bar of POS when you have it open.
Lookup POS Items Using:	SuperManager can lookup items by Item Number, ALU, Desciption1, Description2 and SKU fields in POS. Set this option to the field that you would like to use to link your Yahoo! products with POS.

Account Settings: Separate account settings are stored for Orders and Cash Transactions exports and for each account. When exporting individual orders as Sales Receipts or Invoices into QuickBooks the "Order and Cash Transactions" settings are the only ones that will be used. When exporting batches you can apply different settings to each individual merchant account and a separate set for transactions made outside of your Yahoo merchant accounts.

Combine MasterCard and Visa:	If your merchant account bank combines amounts received from MasterCard and Visa you should check this box. It will create a single line item on the sales receipt for each batch for MasterCard and Visa funds. This will make reconciliation easier.
Do no export this pay method in this account:	Any amounts received from this pay method will be ignored when creating the batch. Should a payment using this pay method be found in a batch it will be lumped into an “Unknown Payments” line item.
Item/Category Name:	The name of the item to be used for the payments received from this pay method. If this field is left blank, SuperManager will use the name of the pay method for the item name, but will give a warning message each time it uses it.
Deduct Transactions Fees from Payment Amount:	(Used for Batch Exports Only) If your merchant bank deducts fees directly from your batch deposits you can use these settings to match the fees your bank deducts. You can enter a per-transaction fee and/or a percentage fee to be deducted. These fees will be deducts using the “Fees Item” as discussed above.

7.9. Report Templates for Invoices and Reports

Use this store setting page to specify different invoices and summary reports. For example you can specify templates to be used for multiple invoices (default, gift, purchase order, backorder, etc) and summary reports (pick list, order summary, etc) to use with The SuperManager. The invoice and summary report template you set as default will be used in the Order List Popup menu function “Print Invoice” and “Print Summary”. The default invoice will also be used when you press ctrl-P.



Report List — This list contains all the report templates defined in your store settings. Several reports are copied to the C:\Program Files\SuperManager directory when you install SuperManager. By default, if these files still exist they will be added to new store databases. You can use the "Add" and "Delete" buttons to add new report templates or delete existing ones. Press the "Browse…" button to select the file using the windows file picker. Double click on an entry to manually edit the path of the template. Paths are stored relative to the smg file by default, but you can also specify an absolute path when you manually edit the path in this manner. Click, then pause for one second, then click again on the name of a report to rename the report.

Type — The type of the report the selected template is. The following report types are available:

- Invoice – For creating reports one per each order. Typically these will be used for invoices/sales receipts.
- Summary – For summarizing order data. When this type is selected total numbers of items ordered, sum of funds collected, etc… are reported rather than individual data for each order.
- Range – For line iteming order data. One line will be exported for each order. Typically these will be used for giving register type reports of funds received.
- Packing Slip – For creating reports one per each shipment. Typically these will be used for packing slips.
- Purchase Order – For creating purchase orders.

Set as Default	Sets the report as the default report of all reports of the same type. There may only be one default report of each type. The default report is used when you select to print the “Default <type>” from print menus.
Autoprint for New Orders	When this option is checked, the selected order will be printed for each new order/set of orders when orders are downloaded.

7.9.a Creating Invoice Templates

The SuperManager uses html templates to create reports. You can create such files in one of many readily available html editors. Recommended editors include Microsoft® Expression Web®, Microsoft® FrontPage® and many others. Use the html editor to create the overall layout of the report. Use the variable list in Appendix A when making your invoice templates. The SuperManager will replace the variables you have included in your invoice template with the specific order information. Several generic and sample templates are included for your reference and we can help you create custom report templates (see http://www.thesupermanager.com for details). A few simple rules will help you in generating successful reports:

Invoice Reports, Packing Slips and Purchase Orders	• A “.pagebreak” style class must be defined for generating a pagebreak between orders. See the sample templates for the exact format of this class. SuperManager will automatically add a pagebreak in between orders using this class. • “item_”, “backordered_item_”, “shipment_” and “total_” field variables must be found within a TR element. When one of these variables is encounted SuperManager will traverse up the HTML code until it finds the <TR> tag, then down the HTML until it finds a </TR> tag. It will then create a row for each item, backordered item, shipment or total respectively. Do not include these field variables outside of a TR element or where you do not want them to be handled in this manner. • **Recommendation:** It is recommended, but not required to use THEAD and TFOOT elements using the style table-group-header and table-group-footer respectively to create repeating headers and footers at the top and bottom of the items, shipments and totals tables.
Summary Reports	• Note that not all variables are available to summary reports. Please notify us on the user forum if additional variables are required.

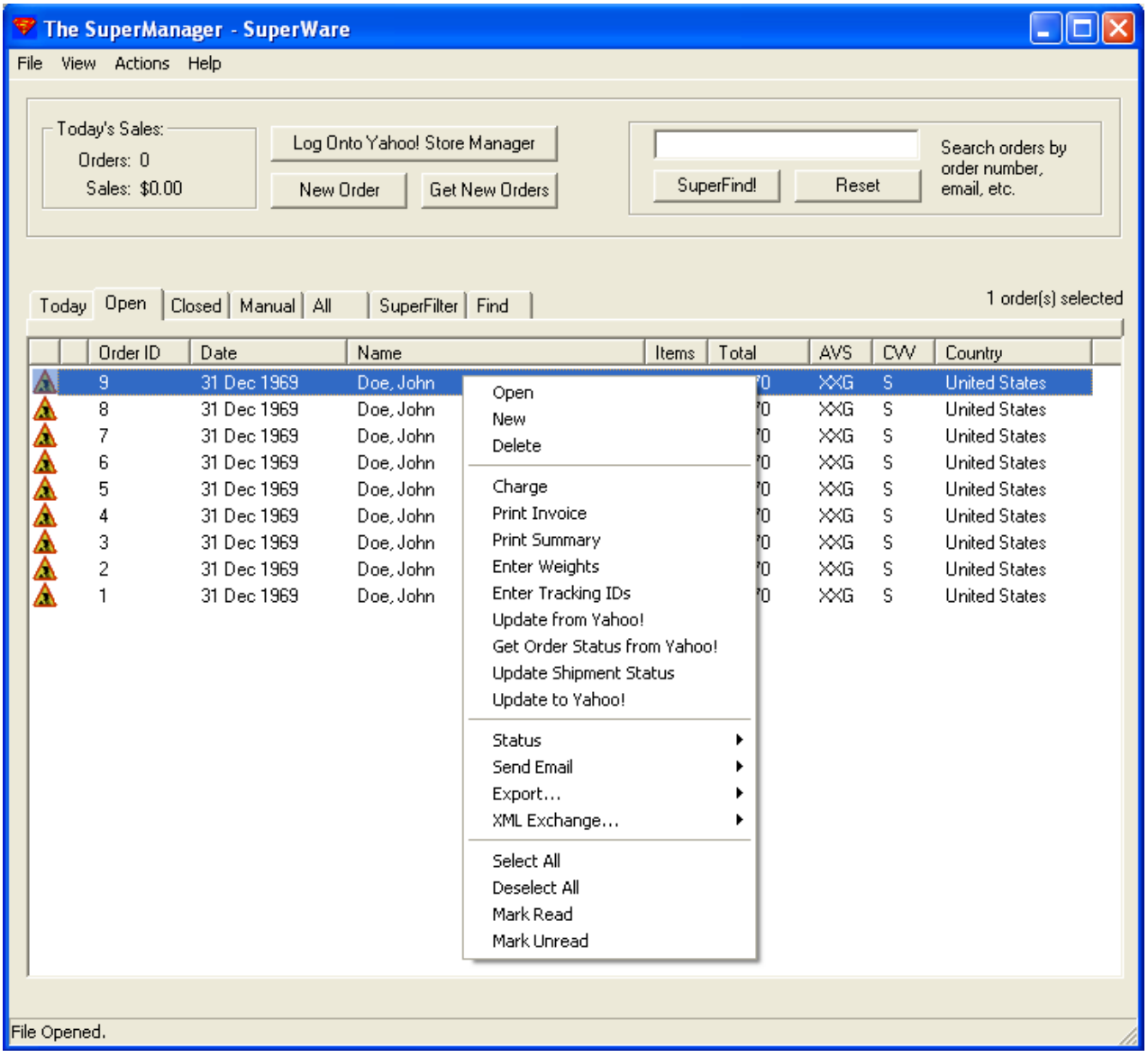
The use of html-based templates makes it easy to create reports that look how you want and contain the necessary information. They also allow for greater customization using java or other script functions for displaying data only under certain conditions, changing formatting or other advanced functions. Examples of such customization are available to use as guides. Contact us at info@thesupermanager.com for more information.

8.0 Order Management

To Download Orders, change to the Orders Dialog Window by clicking "View", then "Orders" from the main menu. Next, click "Actions", then "Get New Orders" or click the "Get New Orders" button. When you download orders for the first time, you will be prompted to provide the first order number you would like to download. It is recommended to download your product database before downloading any orders (see section 9.0, Products). The SuperManager will then begin to download all orders beginning with the first order number you have provided and ending with the latest order. Subsequent times you use the “Get New Orders” function the orders available that are not in your database will be downloaded. You may also download a specific range of orders by clicking "Actions", then "Get Orders…". You will then be prompted to provide a range of orders you would like to download.

You can also import an XML file of orders by choosing “File” → “Import” → “Yahoo!” → “Orders XML” from the menu. This option may be used to import orders that were saved in XML format from the Yahoo! store manager.

Take your time to familiarize yourself with the Order Dialog Window.


The SuperManager - SuperWare
File View Actions Help
Today's Sales:
Orders: 0
Sales: $0.00
Log Onto Yahoo! Store Manager
New Order
Get New Orders
SuperFind!
Reset
Search orders by order number, email, etc.
Today Open Closed Manual All SuperFilter Find
1 order(s) selected
Order ID Date Name Items Total AVS CVV Country
9 31 Dec 1969 Doe, John XXG S United States
8 31 Dec 1969 Doe, John XXG S United States
7 31 Dec 1969 Doe, John XXG S United States
6 31 Dec 1969 Doe, John XXG S United States
5 31 Dec 1969 Doe, John XXG S United States
4 31 Dec 1969 Doe, John XXG S United States
3 31 Dec 1969 Doe, John XXG S United States
2 31 Dec 1969 Doe, John XXG S United States
1 31 Dec 1969 Doe, John XXG S United States
Open
New
Delete
Charge
Print Invoice
Print Summary
Enter Weights
Enter Tracking IDs
Update from Yahoo!
Get Order Status from Yahoo!
Update Shipment Status
Update to Yahoo!
Status
Send Email
Export...
XML Exchange...
Select All
Deselect All
Mark Read
Mark Unread
File Opened.

When you click “Log Onto Yahoo! Store Manager” an internet explorer window will be opened that is already logged into your Yahoo! Store manager.

The main order list gives a lot of information about your orders. The status icons (see section 12.2) next to the order numbers in the Order List give an indication of the order status. A “*” may appear to some or all of the orders on your list. This means that they have not been viewed in the order details dialog or edited in any way since having been downloaded from Yahoo!.

The order list is organized into tabs to make it easier to focus on a specific set of orders you are working on. The “Today” tab will show only orders from today. The “Open” tab will show orders that do not meet the criteria set up in section 7.6. The “Closed” tab shows orders that do meet this criteria. “Manual” shows all order created in The SuperManager, rather than being downloaded from Yahoo!. “All” shows all orders. “SuperFilter” gives you the chance to filter your orders by specific criteria and “Find” shows the results of your most recent “SuperFind”.

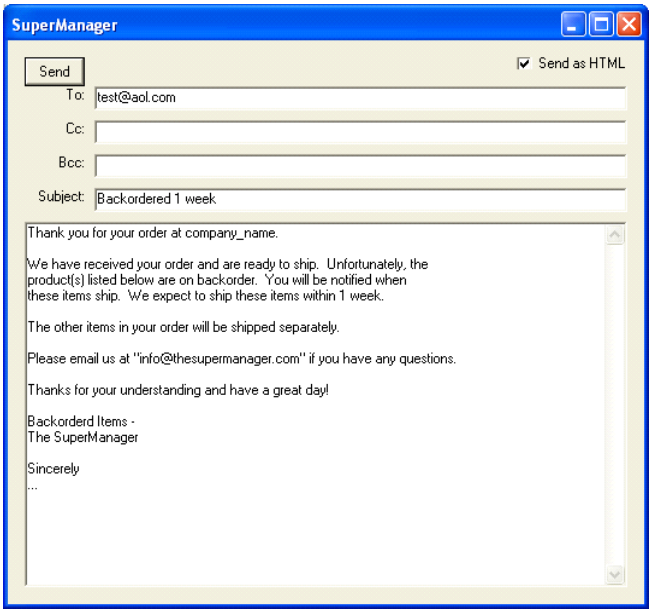
Use “SuperFind” to find orders by name, words in the address, credit card number, items or other fields. Enter the word(s) to search for a click “SuperFind”. The order list will automatically switch to the “Find” tab and will display all the orders returned by your search. When you search for multiple words an AND search is performed.

When you click on the “SuperFilter” tab another set of selection boxes appears. In the first one define what field to filter your orders over. Once you select a filter means to enter the filtering criteria will show up. For example if you filter by date, two date pickers will appear to choose the starting and ending date to filter to. If you filter by Pay Method a dropdown menu will appear in which you can select the payment method to filter to. When you filter by Ship to or Bill to state an edit box will appear in which you can enter the state to filter to. The state can be entered as the complete state name or the postal two character code. After entering the details of your filter click “Go!” to perform the filter. You can filter over multiple fields by selecting a second filter and clicking “Go!” then choosing “From Current List” on the drop-down box that will appear.

By right-clicking in the Order List you will have a wide range of functions to use to manage your orders.

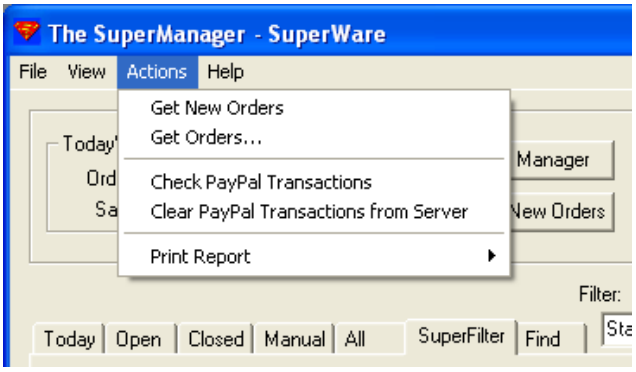
“Open”	Opens the order details screen to view all the order information stored in The SuperManager.
“New”	Creates a new (offline) order
“Delete”	Deletes the selected order(s) after prompting for confirmation
“Charge”	Charges the credit card on file with Yahoo! for the selected order(s) by the total amount due for the order. This is equivalent to charging the order by clicking the “Sale” button on the view order page of the Yahoo! store manager.
“Print Invoice”	Prints or previews the selected order(s) invoice using the default invoice template. See section 0 for more details.
“Print Summary”	Prints or previews the default summary template for the selected order(s).
“Enter Weights”	Cycles through the shipments of the order(s) selected allowing you to update the weight for each one. For information about how the weight is initially calculated in The SuperManager see section 8.1.a.
“Enter Tracking IDs”	Cycles through the shipments of the order(s) selected allowing you to update the carrier and tracking information for each one.
“Update from Yahoo!”	Downloads changes made to the order outside of the SuperManager from Yahoo! Note that the changes available for update are limited to the things stored in the Yahoo! xml format. This does not include shipping information, manual transactions and status.
“Get Order Status from Yahoo!”	Downloads the status as set in Yahoo! and the shipping information available in the Yahoo! store manager.

“Update Shipment Status”	Send the shipment information for the selected order(s) to Yahoo! using their xml email-based method. Note that shipment information sent in this manner typically takes up to 20 minutes to be assimilated into the Yahoo! server. If your store is setup for it, this will also trigger an email to be sent to the customer indicating that the shipment has been sent.
“Update to Yahoo!”	Updates the Yahoo! store manager with any changes made to the selected order(s) in The SuperManager.
“Status”	Change the status of the selected orders to the status selected from the submenu.
“Send Email”	When you roll over this item a submenu will appear containing the “Blank” and all the email templates you have set up as explained in section 7.4. When you select “Blank” an email will be created and addressed in your default email client for each of the selected order(s). When you select a template name an email will be generated for each of the selected order(s). According to your store settings template emails will either be loading into a dialog for you to further edit or automatically sent.


SuperManager
Send
Send as HTML
To: test@aol.com
Cc:
Bcc:
Subject: Backordered 1 week
Thank you for your order at company_name.
We have received your order and are ready to ship. Unfortunately, the product(s) listed below are on backorder. You will be notified when these items ship. We expect to ship these items within 1 week.
The other items in your order will be shipped separately.
Please email us at "info@thesupermanager.com" if you have any questions.
Thanks for your understanding and have a great day!
Backorderd Items -
The SuperManager
Sincerely
...

“Export”	When you roll over this item a submenu will appear containing a few standard formats exported by The SuperManager and all the custom export formats you have created according to section 6.2. When you select a format the selected order(s) will be exported in this format.
“XML Exchange”	Brings up a submenu of programs currently supported for automatic interchange with The SuperManager. Currently DAZzle/Endecia, QuickBooks and QuickBooks POS are supported.
“Select/Deselect All”	Selects all orders in the current list.
“Mark Read/Unread”	Toggles whether a “*” is shown next to the select order(s).

By choosing “Actions” from the main menu other functions are available



“Get New Orders” runs the same function as when you click the button on the dialog. “Get Orders…” allows you to specify a range of orders to download as discussed above.

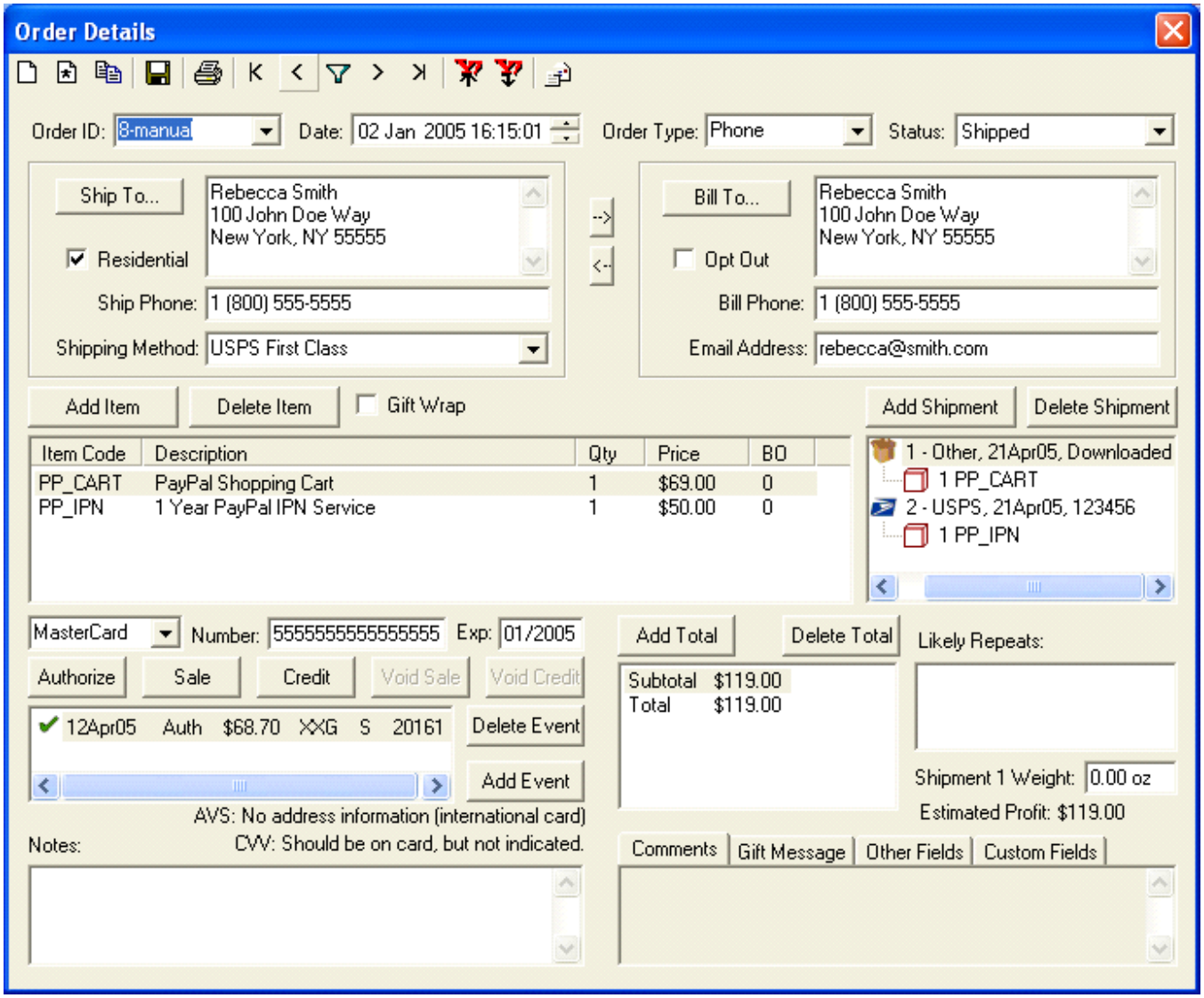
“Check PayPal Transactions” downloads transactions from your PayPal account if you have subscribed to the PayPal service. Please contact sales@thesupermanager.com to set this up. After setting up the service this function will get the PayPal transactions you have received and automatically add them as payment events to the orders they are from. The SuperManager uses several different ways to try to match the PayPal transactions to the orders from which they came. First of all it tries to match them via the order number. If the order number is not referenced in the transaction it tries to match them using the first and last name, email address and amount. If the SuperManager is not certain whether a transaction matches an order it will prompt for you to confirm whether to add it to an order.

Periodically you should use the “Clear PayPal Transactions from Server” function to minimize the time it takes The SuperManager to match transactions with the orders.

There are several ways to print invoices for orders in The SuperManager. One method is to select “Print Invoices” as described above. Additionally you can press ctrl-P to do the same thing. These two functions, however, only allow you to print the selected orders to the default invoice template. This is similar for the summary reports. You can have multiple templates defined in The SuperManager to meet special needs that some of your orders may have. To print an invoice or summary report using a different template use the "Print Report" menu in the “Actions” menu and select the desired invoice or summary report template. See section 0 for details on setting up and creating invoice templates and specifying to preview invoices before printing. See section 6.1 to specify settings for automatic invoice printing when new orders are downloaded.

8.1. Modifying Orders

To bring up the details of an order to modify or view specifics of an order use the “Open” function as show above or double-click it to open the Order Details Dialog.



In this window you will see all of the information stored in your order.

The toolbar at the top contains several buttons for working with your orders:

- Creates a new, blank order
- Creates a new order to the same customer as the current order. Address and payment information will be copied from the current order.
- Create an exact copy of the current order, except the order id. Use this for recurring orders.
- Save changes made to the order. All changes you make to your orders are stored in a buffer. They are not written back into your database until they are saved. Saving the changes here does not, however, save them to the physical file on disk. To do that you have to use the “File”, “Save” function.
- Print an invoice of this order using the default invoice template.
- Scroll through your orders. The arrows with the bars jump to the first or last order, the regular arrows jump the previous or next order. By clicking the toggling filter button to on, the orders you scroll through will be limited to those on the order list currently in view in the orders dialog.

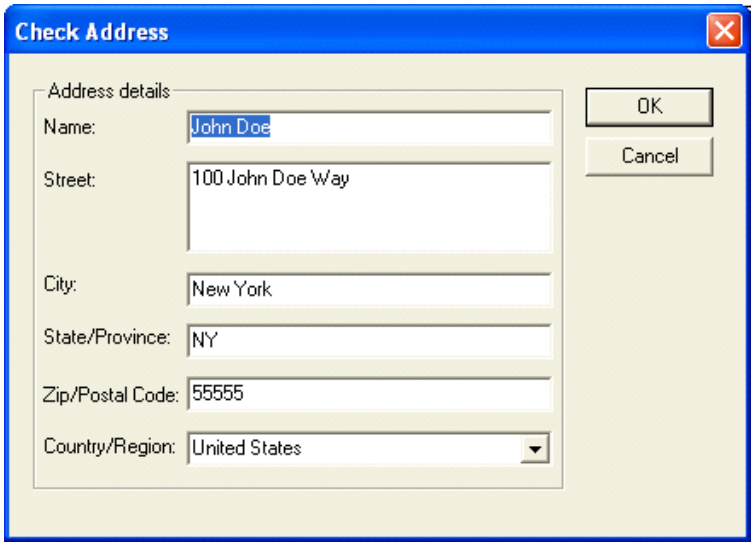
- Update order changes to Yahoo!
- Download order changes from Yahoo!
- Brings up a menu containing all your defined email templates, allowing you to send any of them to the customer you are viewing.

In addition to the arrows on the toolbar you can use the “Order ID” dropdown to move to another order.

Use the “Order Type” field to specify how you received this order. For orders downloaded from Yahoo! this will automatically be set to “eStore”. You cannot change the order type for downloaded orders, although you can rename this order type as described in section 7.7. In this same section it describes how you can setup order types to distinguish between orders received via phone, fax, in your brick and mortar store or via other avenues.

The “Order Status” shows the status just as it is displayed on the order list of the Order Dialog. It may be changed here.

When you enter the address information in the “Ship to” and “Bill to” boxes, The SuperManager will attempt to parse the address into the different fields. If it cannot understand the different pieces of the address or you press the button next to the edit box a dialog will appear in which you can enter the address line by line.



The arrows in between the shipping and billing address can be used to copy one address to the other.

The “Opt Out” checkmark is to flag orders in which the customer has requested not to receive solicitous communications from you. If you add a custom variable to your address information in Yahoo! called “Opt Out” and the value is set to “YES” this checkmark will be checked when the order is downloaded. Once this checkmark is selected you will be warned before sending an email to the customer.

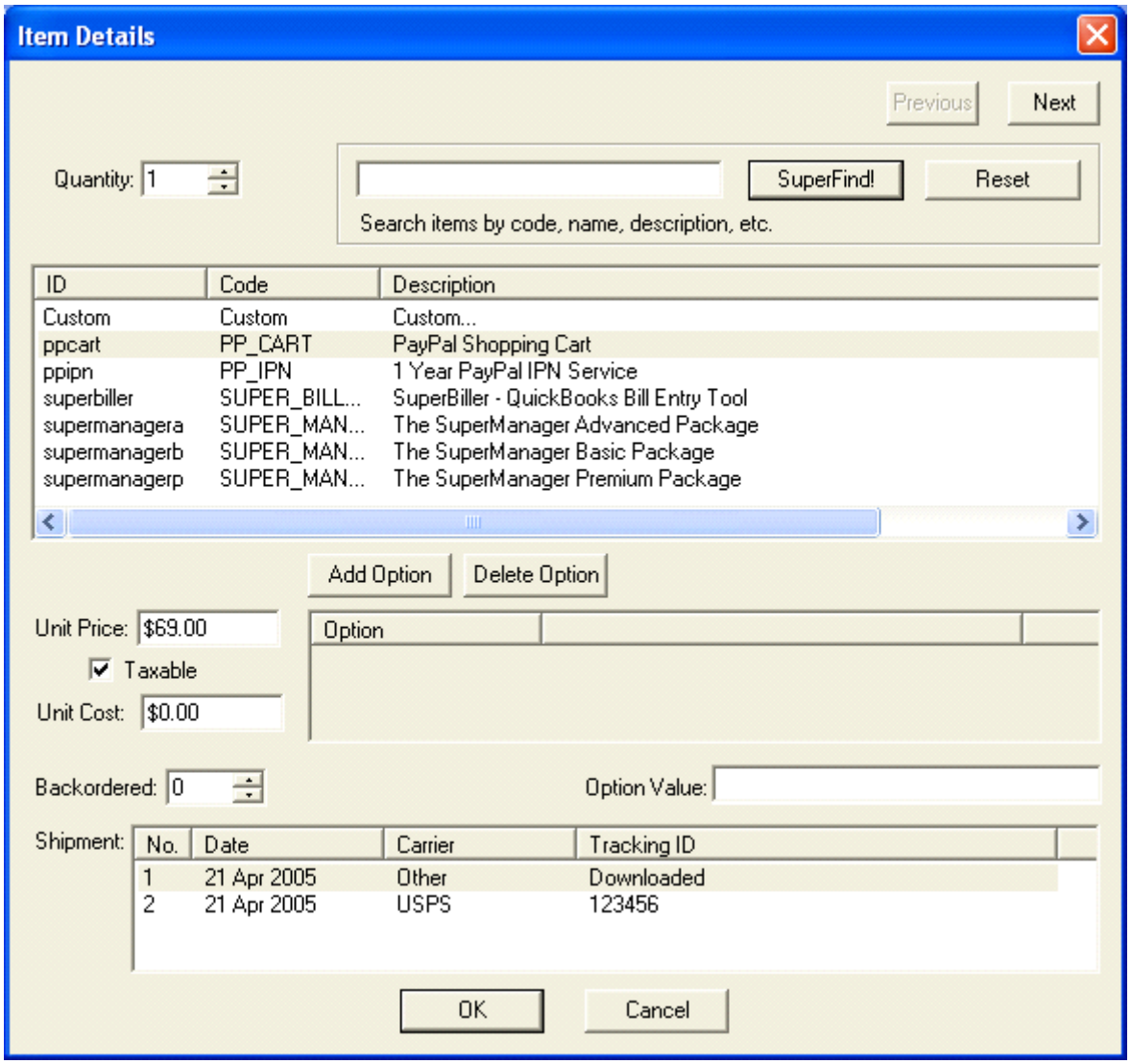
8.1.a Add, Delete, or Modify Order Items

You can add or delete items from an order by clicking on the “Add” and “Delete Item” buttons. You can also right-click in the Order Item List and options to add, delete and edit items will appear. Additionally you can set an item as "Backordered". When you toggle an item to backordered it is assumed that all of this item's quantity is backordered.

The "Add Item" or "Modify Item" selection will open the Item Details Dialog as shown below. Here you can modify the Price, Quantity, Tracking ID, Taxable Status or Number Backordered, and shipment number for an item.

Prices modified here will only be changed in the specific order that you are modifying. You can search your product database using the SuperFind function to find specific items to add to your order. You can also double click on a product to open its details for closer inspection.

When you mark an item "Backordered", The SuperManager will automatically change the order status to "Backordered". You can use the variable "backordered_items" to include in emails to customers a list the backordered items. Just add the variable to an email template and The SuperManager will replace it with a list of the backordered items for that order.



If there are options in the product you have selected to add to this order, you will be given a list of those options and can set the values for each one. You can also add, delete, rename or modify options in the item. To rename an option select it from the option list, then click on the name.

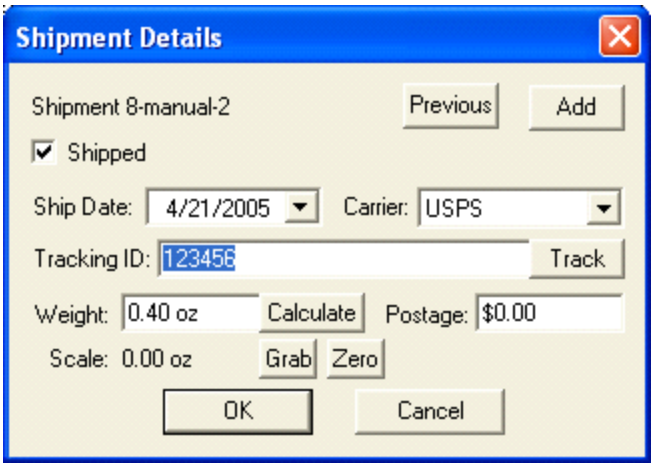
At the bottom of the dialog is the shipment information for the order. The shipment this item belongs to is selected on the list. You can change the shipment by selecting a different one. You can also move items from one shipment to another via drag and drop on main the order details dialog.

8.1.b Add, Delete or Modify Shipments

When you download or create a new order one shipment is added to it. You can add additional shipments to it by clicking the add button above the shipments tree.

For example an order with one or more backordered items should have two shipments: one containing the items that you ship right away and another containing the items on backorder that will be shipped later. Once you have specified more than one shipment is in an order you must open each item and specify which shipment it will be shipped with as described above. You should setup the number of shipments before you add weight information or export to your shipping software.

Shipment information can be changed by double clicking on the shipment of interest



8.1.c Charging and Crediting Credit Cards

Use the Authorization, Sale, Credit, Void Sale and Void Credit buttons to manage the charging and crediting of your orders. The Void Sale and Void Credit buttons can be activated by selecting the charge or credit to void. If a charge has already been batched, the void buttons will be unavailable. Batched transactions will have a checkmark next to them. Once you have batched ("Submit Batches") a charge or credit, you must issue a credit or sale respectively to "cancel" the previous transaction. Transactions are only marked batched if the batch that contains them has been downloaded. See section 10.0 about working with batches.

You can only issue one sale or credit through the Yahoo! order manager order details page once so The SuperManager will automatically process additional transactions through the Yahoo! store manager manual transactions page if necessary.

When you make a transaction in The SuperManager a credit card event will be added to the card event list for future reference.

For new orders, you can obtain an authorization first and view the AVS response and then immediately capture the sale. You can also authorize credit cards by $0.01 to verify updated billing addresses which previously returned a negative AVS response.

Use the security settings to limit access to the credit card authorizing, charging and crediting functions. See section 7.2 for more information.

8.2. Moving Orders from Open to Closed

The SuperManager will help you assure that each customer is charged the amount due and that all items are shipped. To help you do this the order list is set up with various tabs to help you quickly asses which orders require action. The “Open” tab is intended to show you which orders require attention. You can set which orders are considered open by changing the setting as described in section 7.6.

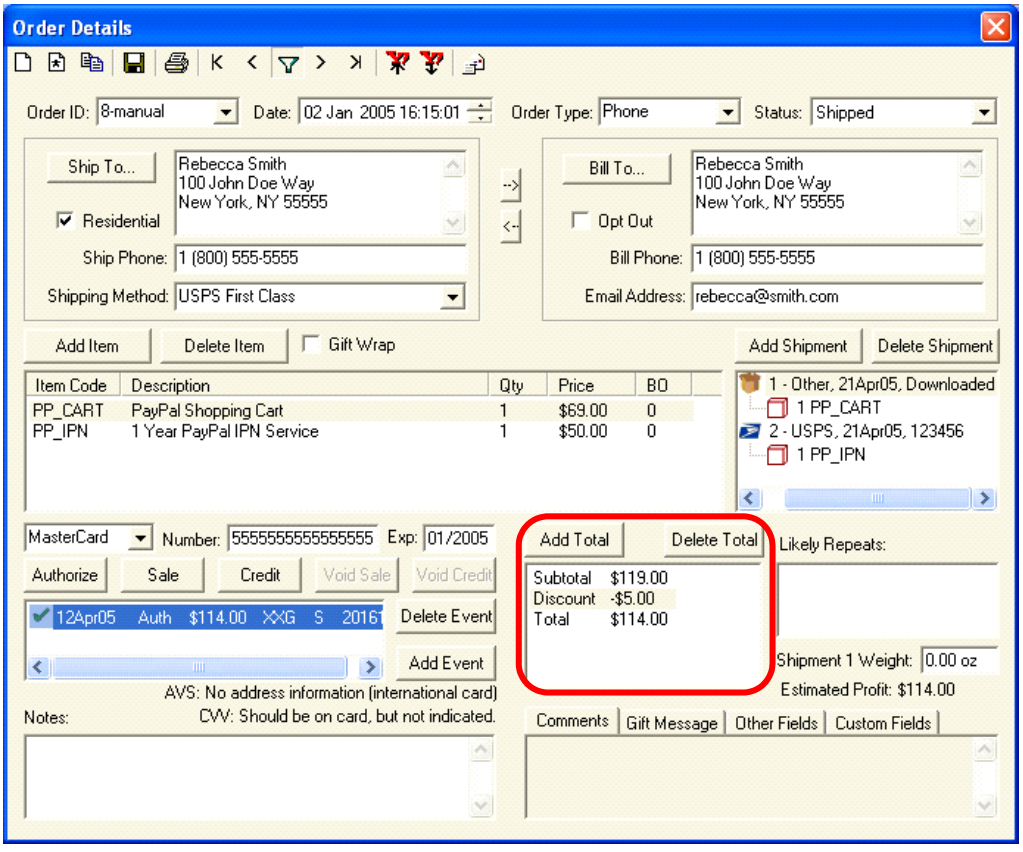
8.2.a Getting Orders to Charged/Paid Status

In order for an item to be marked charged/paid it needs to have the amount received from the customer equal to the amount due. The amount due can be adjusted in two primary ways. First you can change the amount due by adding, removing, changing quantities or prices for the items in the order. Secondly you can change the amount due by adding, removing or changing amounts of the total line items.

Items can be added and deleted from the order details dialog as shown in section 8.1.a.

8.2.a.1. Add, Delete or Modify Total Line Items

The total line items in the order are shown in a list at the bottom of the order details dialog.



They can be added, deleted or modified to correctly reflect shipping, taxes and other service charges and adjustments. The "Add Item" or "Modify Item" selection will open the Total Details Dialog as shown below.

The type field can be one of the following options:

Shipping
Tax
Gift Wrapping
Discount
Miscellaneous Adjustment
Coupon
Gift Certificate
Credit

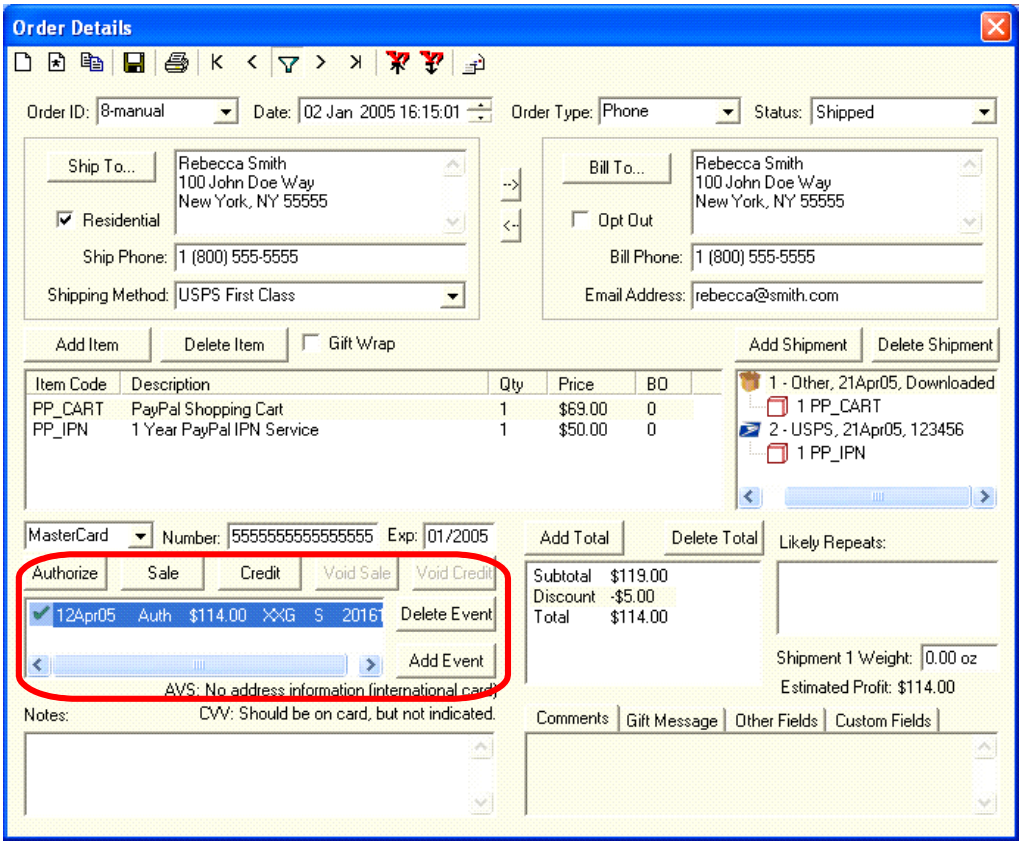
The name field is by default set to the type. It can be changed to better document what the total line item is for. For example you could add a discount total and give it “Good Customer” for a name.

The “Guess” button can be used to adjust the amount due to the amount paid. For example if an order currently has $25 as the amount due and there is a payment for $20 in the order the guess button will set the value to -5$.

Note: The subtotal and total lines may not be deleted or changed. They are automatically calculated and appear in every order.

8.2.a.2. Add, Delete or Modify Card/Payment Events

After the amount due reflects the proper amount required of the customer the payments received from the customer are documented using card/payment events. A list of all the payments received in the order is shown at the bottom right corner of the order details dialog.



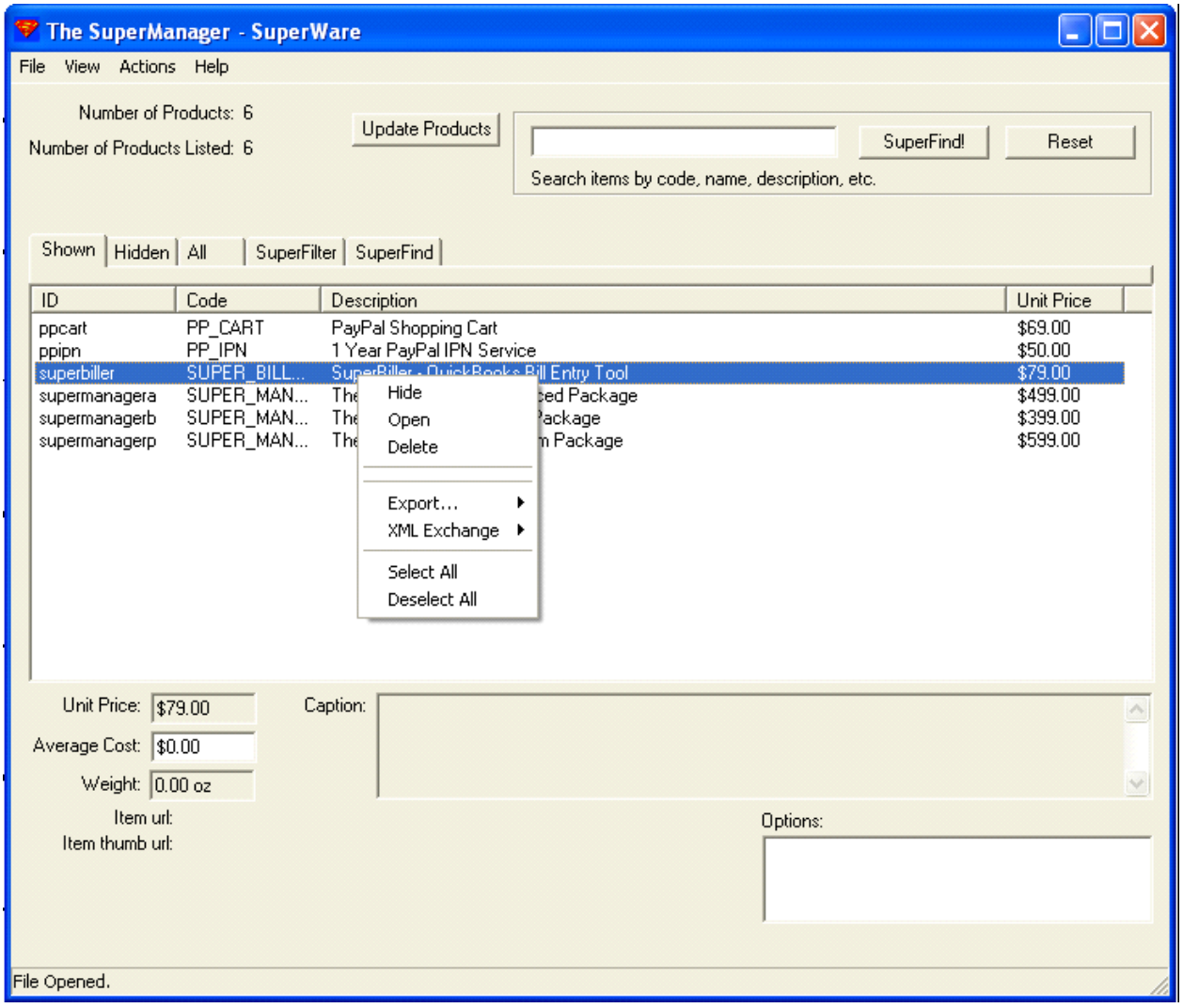
Card events created through the standard order processing page in the Yahoo! store manager are downloaded from Yahoo! and displayed in this list. If you subscribe to the SuperManager PayPal IPN service PayPal payments received even from outside of the shopping cart will also be displayed on this list. Whenever you make a manual sale, credit, void sale or void credit from within The SuperManager these events will also be displayed on this list. Additionally you can manually add events to this list to record other payments received from a customer. Use the “Add Event” and “Delete Event” buttons for this purpose.

Once you have recorded payments that total to the amount due from the customer the status of the order will automatically change to reflect that it has been charged or paid. Orders with credit card transactions will be marked as charged and those with PayPal or cash transactions will be marked as paid. This will also transfer the order from the “Open” to the “Closed” tab on the order list if you have chosen to have payment status to be the only consideration for open and closed orders. Again refer to section 7.6 for your options in this regard.

9.0 Products

9.1. The Products Dialog

Products management is offered in The SuperManager to view products as they are entered on Yahoo!, export them to other programs, create offline orders and track order profit. The product details dialog is the core of the product management features.



Use the "Update Products" to download your products from Yahoo!. During this function ship methods and pay methods are also imported from your Yahoo! Store. The same function can also be run by clicking “Actions” then “Update Products”. You can also import products from a file by clicking "File", then "Import" then select "Yahoo Product CSV" or select an import format you created in section 6.5. Additionally products will automatically be added to your store database as you download orders containing items not already contained in your product list in The SuperManager.

Click “Hide products which do not have a specified price” to hide products that have been specified as hidden.

Use the SuperFind to filter the product list to those returned by the search. Click the “Reset” button to show all products again.

When you right click on the product list a context menu will appear containing several functions.

Click “Hide” to hide the selected product(s). To unhide a product you must make sure that “Hide products which do not have a specified price” is not checked. This will make it so all products will be displayed. Then you can select the product(s) you want to unhide, right click and select hide again.

Click “Open” to open the product details for the selected product.

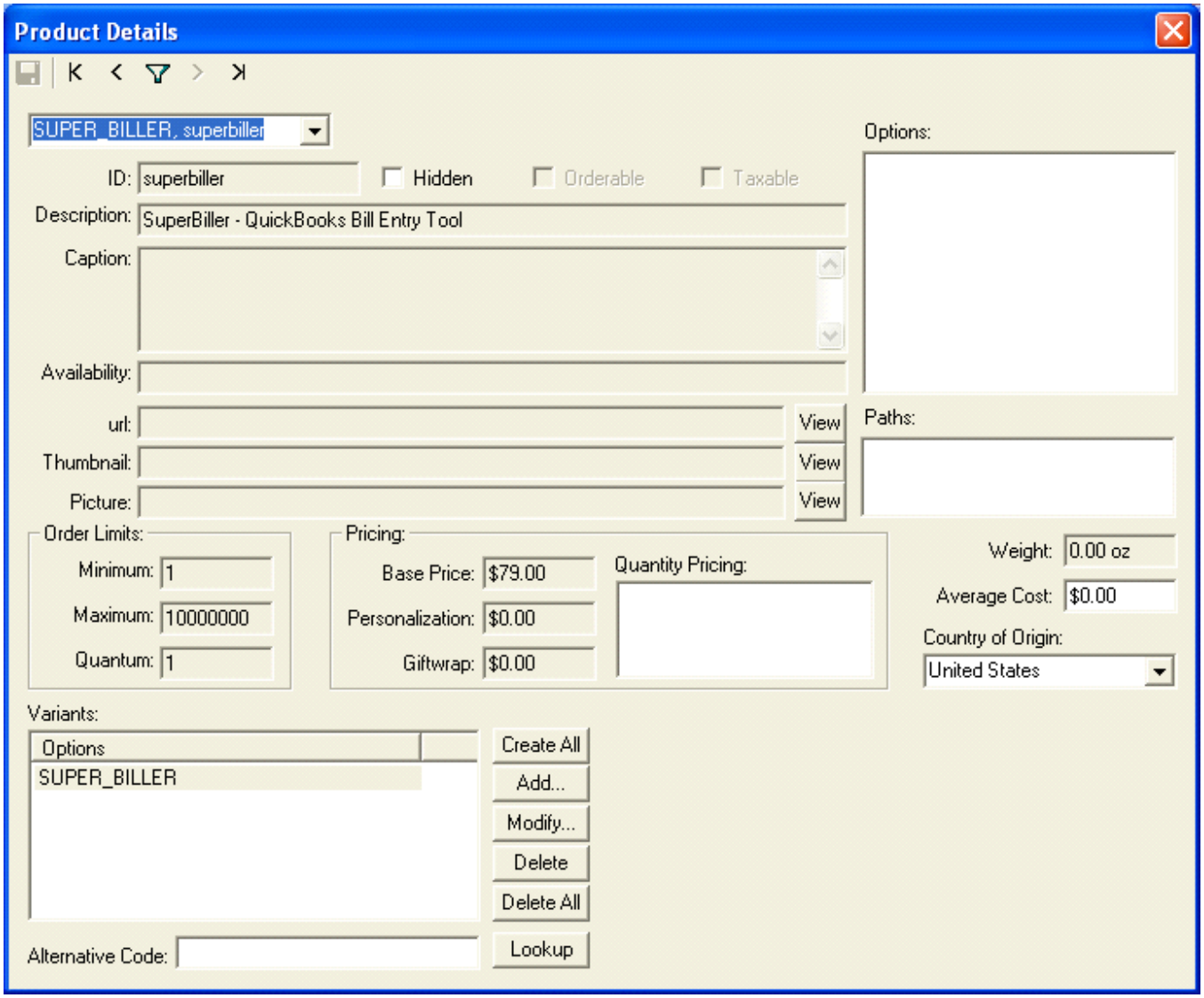
Click “Delete” to delete the selected products(s).

Click “Export” to export the selected product(s) to one of the product exports in your program settings.

Click “XML Exchange” to export the selected product(s) to QuickBooks or QuickBooks POS.

9.2. The Product Details Dialog

All variables contained in your Yahoo! Store products can be view in the product details dialog.



The majority of the fields on this dialog are not editable. To make changes to your products you will need to make the changes in the Yahoo! Store manager and re-download your products to update The SuperManager.

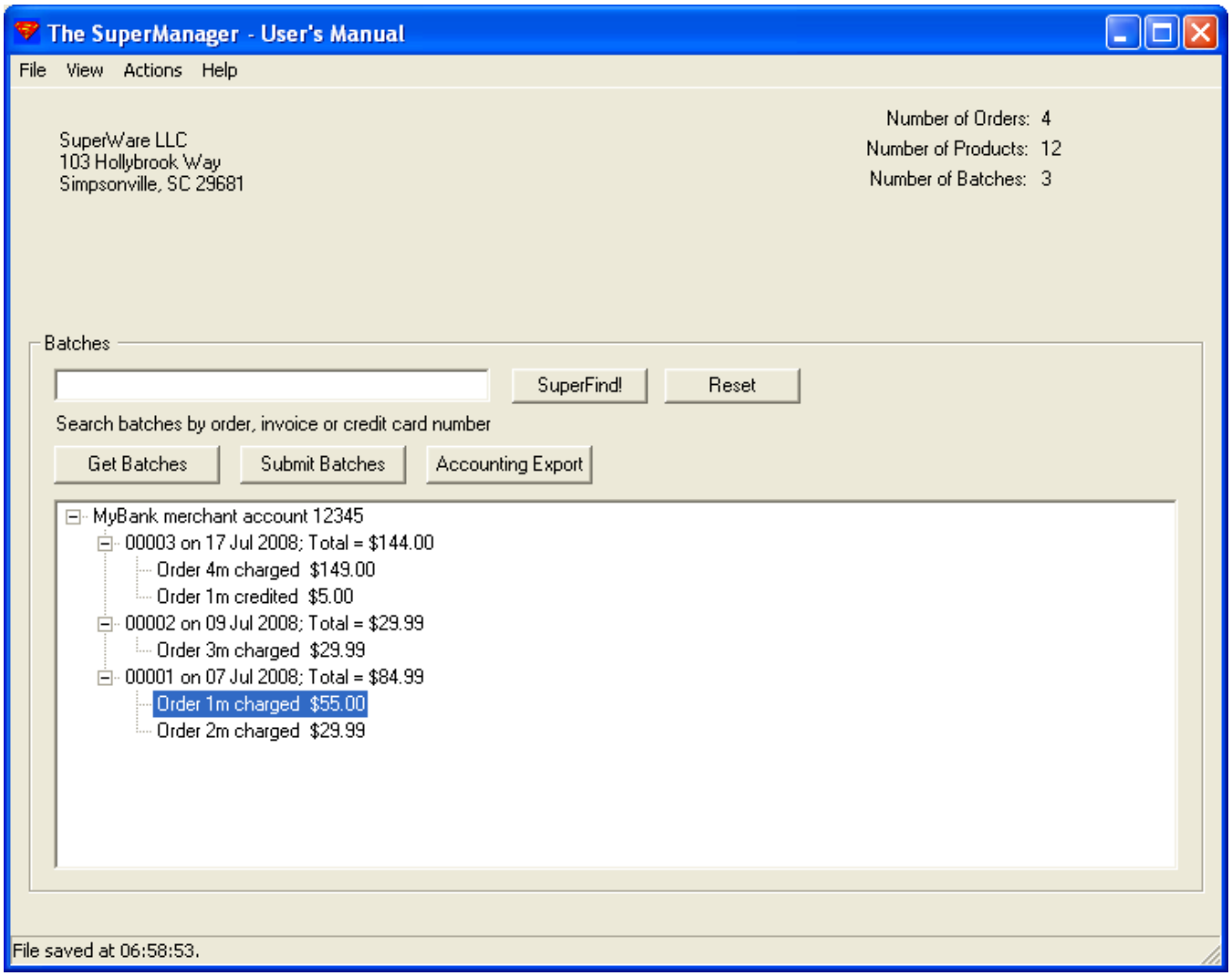
You can also toggle a product as hidden or unhidden on this dialog.

The average cost is the only other field that can be edited in this dialog. This value is used to calculate the profit made from an order. When an order is downloaded this cost is assigned to sales of this product as the cost of the item. The cost can be adjusted in the item details dialog to make the profit calculation exact for the order.

To view the page, thumbnail or picture click the “View” button next to it. It will be launched in an internet explorer window.

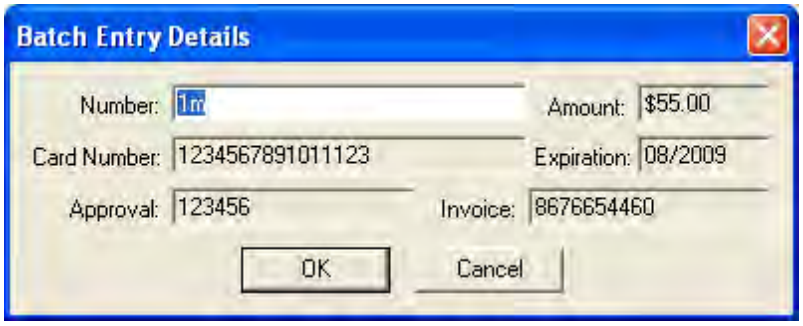
10.0 Merchant Batch Management

The Batch Manager will download your merchant batches and store them locally. You will be able to use the batches to export your transactions to your accounting software as well as investigate historical charges and credits. Use the SuperFind function to find specific batches based on amount, order number, etc. The "Submit Batches" button will submit your pending transactions to your default merchant account that is specified in Yahoo! and it will also automatically run the "Get Batches" routine to download the latest batches. Press the "Get Batches" button to download the latest batches from Yahoo!. If you have saved batches in a text file, you can import these into the Batch Manager by clicking "Actions" then "Import Batch File".


The SuperManager - User's Manual
File View Actions Help
SuperWare LLC
103 Hollybrook Way
Simpsonville, SC 29681
Number of Orders: 4
Number of Products: 12
Number of Batches: 3
Batches
SuperFind!
Reset
Search batches by order, invoice or credit card number
Get Batches
Submit Batches
Accounting Export
MyBank merchant account 12345
00003 on 17 Jul 2008; Total = $144.00
Order 4m charged $149.00
Order 1m credited $5.00
00002 on 09 Jul 2008; Total = $29.99
Order 3m charged $29.99
00001 on 07 Jul 2008; Total = $84.99
Order 1m charged $55.00
Order 2m charged $29.99
File saved at 06:58:53.

10.1. Looking at Batch Details

You can expand each batch to show the individual transactions that were included in it by clicking on the “+” sign to the right of it on the entry tree. You can look at the details of a transaction included in a batch by then double clicking on the transaction or right clicking and choosing “Open”. The following window will appear containing the details for the batch entry you have selected.



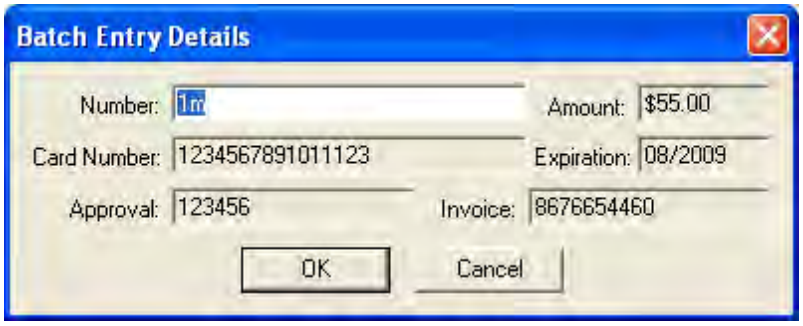
In this window the majority of the fields are not editable, but the number can be changed. In most instances SuperManager should be able to correctly associate it with the appropriate order, but if not the number can be changed to the order number to correctly associate it.

In addition to looking at the transaction details you can right click on the order and choose “Open Order” to open the order for which this transaction was made.

10.2. Accounting Export

10.3. To export transactions to your accounting software, start by opening the Admin "Home". It is recommended to get the latest batches that have been submitted before information. To get the latest batches, click the "Get Batches" button (see section 10.0, Management). Also, you should specify your Accounting Export settings in your Store Settings Dialog (see section 10.1. Looking at Batch Details

You can expand each batch to show the individual transactions that were included in it by clicking on the “+” sign to the right of it on the entry tree. You can look at the details of a transaction included in a batch by then double clicking on the transaction or right clicking and choosing “Open”. The following window will appear containing the details for the batch entry you have selected.

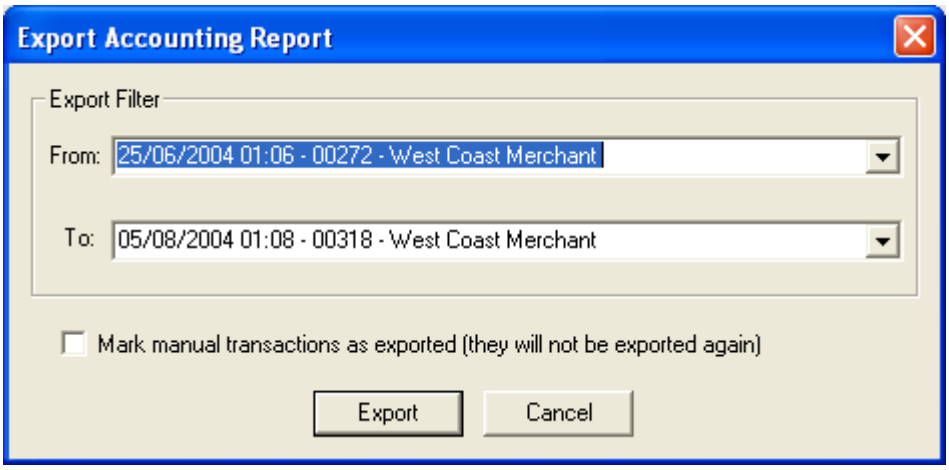


In this window the majority of the fields are not editable, but the number can be changed. In most instances SuperManager should be able to correctly associate it with the appropriate order, but if not the number can be changed to the order number to correctly associate it.

In addition to looking at the transaction details you can right click on the order and choose “Open Order” to open the order for which this transaction was made.

Accounting Export). Once the new batches have been imported, click the Accounting Export button. Once the Accounting Export Dialog is open, you can select the Merchant Account you would like to export transactions from and then select the batches by date or by batch number. Next, select the preferred file format for exporting and

then click "Export". Be sure to save the file to a convenient location. If you would like a new export file format to be added, please contact Technical Support by emailing techsupport@thesupermanager.com.


Export Accounting Report
Export Filter
From:
25/06/2004 01:06 - 00272 - West Coast Merchant
To:
05/08/2004 01:08 - 00318 - West Coast Merchant
Mark manual transactions as exported (they will not be exported again)
Export
Cancel

11.0 Interfacing with Other Programs

The SuperManager was designed to be very versatile in interfacing with other programs. Several direct integrations have been developed including Dazzle, QuickBooks and QuickBooks POS. The SuperManager also offers the powerful ability to export in practically any text format required by other software. The subheadings of this chapter explain how to setup interfaces with many programs. If you need help setting up interfaces with other programs please contact info@thesupermanager.com.

11.1. QuickBooks

The SuperManager supports the export of orders as sales receipts, order as invoices, batches as sales receipts and products as items into QuickBooks.

Important: Before exporting anything to QuickBooks make sure you have a good backup

11.1.a Setting up your QuickBooks file for use with The SuperManager

A few things are required in order to successfully import data from The SuperManager. First, you will need to download and install two patches from Intuit that install the necessary interfaces. These are available at

http://www.thesupermanager.com/download/redistributables/QBFC5_0Installer.exe

http://www.thesupermanager.com/download/redistributables/QBXMLRP2Installer.exe

After installing these patches you need to make sure you have an account to use for the following items:

Account	Applicable Export(s)	Purpose
Accounts Receivable	Orders	An account into which payments on credit memos and invoices are deposited.
Cost of Goods Sold	Products	An account that is linked to the products that are exported from The SuperManager as the cost of goods sold account.
Inventory Asset	Products	An account that is linked to the products that are exported from The SuperManager when you have selected to export as inventory items as the inventory asset account
Taxable Sales	Products, Batches	The account that is set as the income account for taxable products exported from The SuperManager.
Nontaxable Sales	Products, Batches	The account that is set as the income account for non-taxable products exported from The SuperManager

Additionally there are a number of items The SuperManager references in creating sales receipts, credit memos and invoices in QuickBooks. The SuperManager is capable of creating these items if they do not exist. Each of these items will be described below.

11.1.b Setup for Exporting to QuickBooks

Before exporting to QuickBooks several settings need to be entered in The SuperManager. These settings are located in two places. The program settings contain settings that apply to all SuperManager databases you work with in SuperManager. These settings are explained in section 6.6.b. The store settings apply only to the particular store database you have opened. These are explained in section 7.8.

11.1.c Product Item Names

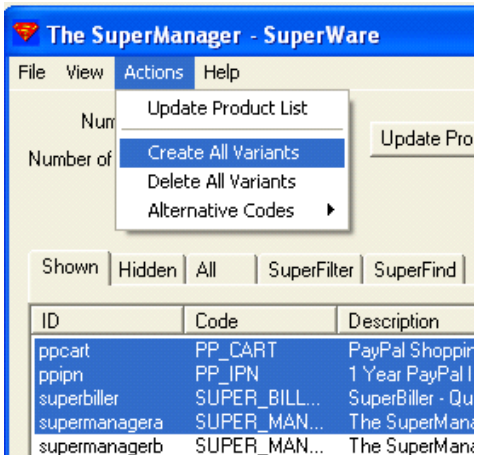
The SuperManager is able to handle different combinations of product options and can use existing items or create new items. Items can be created in batch from the products dialog or will be automatically created on the fly as an item name not existing in QuickBooks is encountered while exporting orders.

11.1.c.1. Matching Products with Existing QuickBooks Items

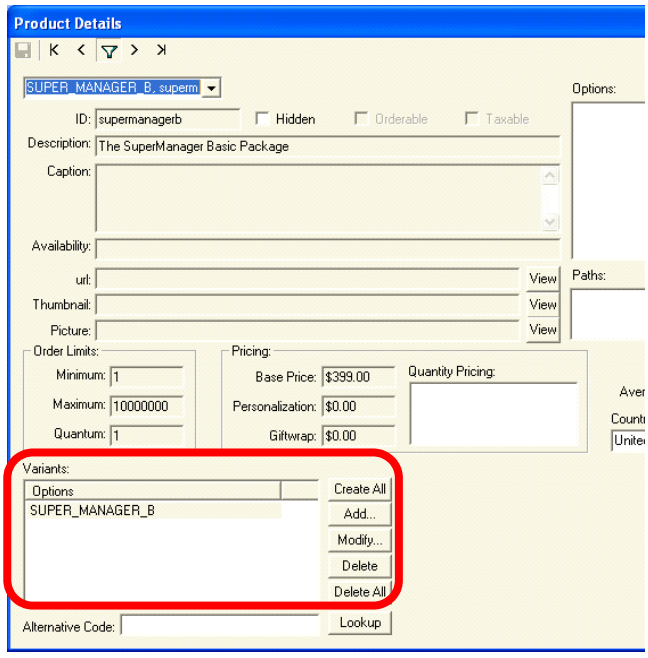
If you have many or all of your items already in your QuickBooks file you can setup The SuperManager to use these items rather than creating new ones. To do this you will need to create product variants for those products that already have a QuickBooks counterpart. Do this by following these steps:

1. Go to the products dialog and select the product(s) that need to be matched with a QuickBooks item. Select multiple products by holding the ctrl key.

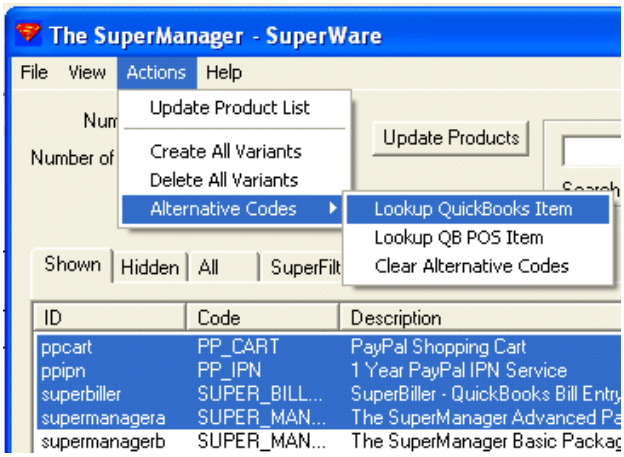
2. Choose “Actions” | “Create All Variants” from the menu.



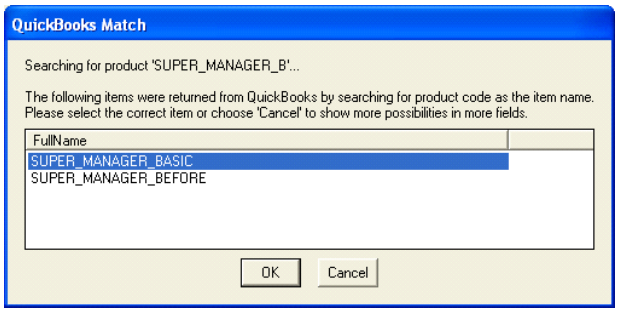
3. After creating all variants you can check that the variants are correct in the product details dialog. The variants are listed in a box at the bottom left corner of the dialog. For products without variants (as shown) there will just be one variant with the product code as the variant name. For products with options one variant will exist for each unique combination of the options.



4. Choose “Actions” | “Alternative Codes” | “Lookup QuickBooks Item”.



5. For each option variant The SuperManager will search for a corresponding QuickBooks item. If there is more than one item name containing the product code the results of the query are shown in a list box as shown. Select the item to match the variant with and click OK.


QuickBooks Match
Searching for product 'SUPER_MANAGER_B'...
The following items were returned from QuickBooks by searching for product code as the item name.
Please select the correct item or choose 'Cancel' to show more possibilities in more fields.
FullName
SUPER_MANAGER_BASIC
SUPER_MANAGER_BEFORE
OK
Cancel

6. If the correct product is not found by the query you will have to manually enter the full name of the QuickBooks item in the product details screen. Select the variant you are matching from the “Variants” list and enter the full name of the QuickBooks item in the “Alternative Code” box. If the item is a sub-item of another item the name should be entered in the form <*item name*>:<*sub-item name*>

Note: If you wish to not distinguish between the different option combinations for a product in exporting to QuickBooks you will need to either delete all variants from the product in The SuperManager and the item name in QuickBooks will have to match the product code or you will have to set the alternative code for each variant to the same value.

11.1.c.2. Creating New Items

As stated above The SuperManager will automatically create items for each product/variant that does not exist in QuickBooks as you export orders. They will be created with the Yahoo! product code as the item name. For items with variants sub-items will be created for each variant.

Note: If you wish to have sub-items created for each variant of a product you will have to create the variants for the product as shown above. Otherwise The SuperManager will export all option combinations to the same item in QuickBooks.

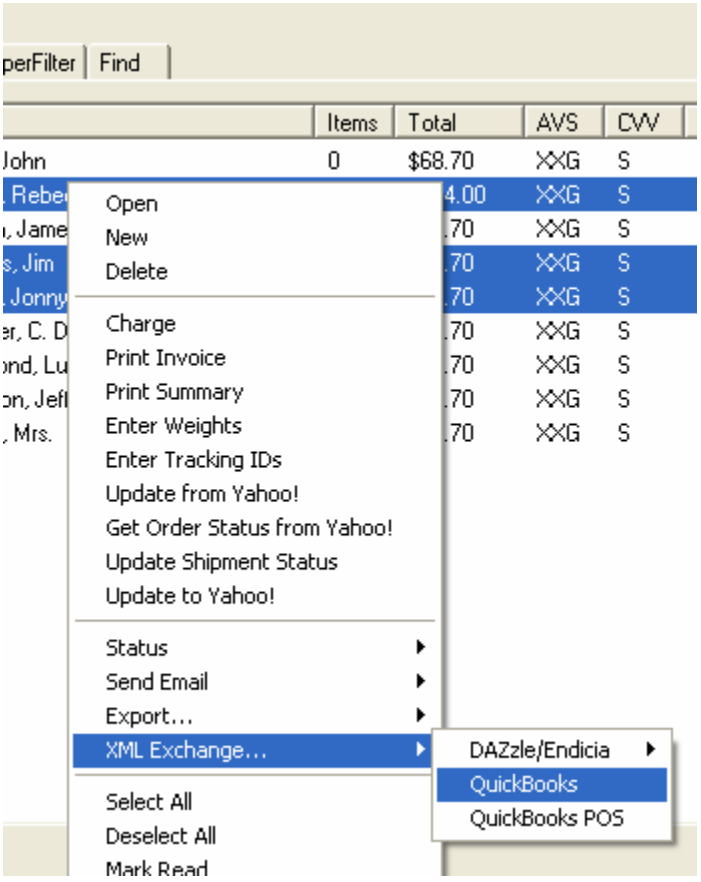
If you wish for the item to be created in QuickBooks with a name other than <*product code*>:<*variant*> enter the name you want to be used in the alternative codes box for the variant(s) before exporting the product to QuickBooks.

11.1.d Exporting Orders to QuickBooks

Before exporting orders to QuickBooks you should assure that the order is in the state you want it to be in for exporting. Refer to section 8.2 for instructions on how to move orders from open to closed status. Note as well

that if you have received more payment from your customer than the order has for the amount due the sales receipt/invoice will not be created for the order.

After all your settings are entered and your orders are prepared to export using the QuickBooks export is very simple. Just select the orders or products you want to export, right click and choose “XML Exchange” | “QuickBooks” from the dropdown menu. Or for batches press the “Accounting Export” button and choose “QuickBooks” from the list. Your orders, products or batches will be exported. A log will appear reporting how the export went.



11.2. QuickBooks Point of Sale

The SuperManager supports export of products and orders as sale receipts into QuickBooks Point of Sale.

11.2.a Setup for Exporting to QuickBooks POS

First, you will need to download and install a patch from Intuit that installs the necessary interfaces. This is available at

http://www.thesupermanager.com/download/redistributables/QBPOSFC1_1Installer.exe

In addition to this there several settings need to be entered in The SuperManager. These settings are located in two places. The program settings contain settings that apply to all SuperManager databases you work with in SuperManager. These settings are explained in section 6.6.b. The store settings apply only to the particular

store database you have opened. These are on two separate tabs – “Tax Rates”, described in section 7.5 and “Accounting Export”, described in section 7.8.

A Note about Tax Rates: First you should verify that tax is being accessed the same way in The SuperManager as in POS. Secondly you need to put the “Name” on the “Tax Rates” tab for each Locale to the “Tax Code” in POS. When an order is exported SuperManager will figure out according to this prioritized list which tax locale should be applied. So for example if there where a zip code range preceding the item shown on the list above orders from this zip code range would have this tax rate applied even if they also happened to be from North Carolina. After determining which tax rate should be applied SuperManager looks for a “Tax Code” under the “Tax Location” provided above in POS. If a matching code is not found the export will end in an error.

After setting up these settings additional settings need to be made in your products. Each product has one or multiple “Alternative Code”. There will be one alternative code for each product variant (a unique combination of options). The POS field specified in the “Lookup POS Items Using” setting above must match the alternative code for the product variant in SuperManager. If the alternative code is left empty the POS field will be assumed to be the Yahoo! product code. One of the major tasks of setting up SuperManager to properly export orders to POS will be ensuring that the alternative code matches the POS field you have specified.

11.2.b Using the QuickBooks POS Export

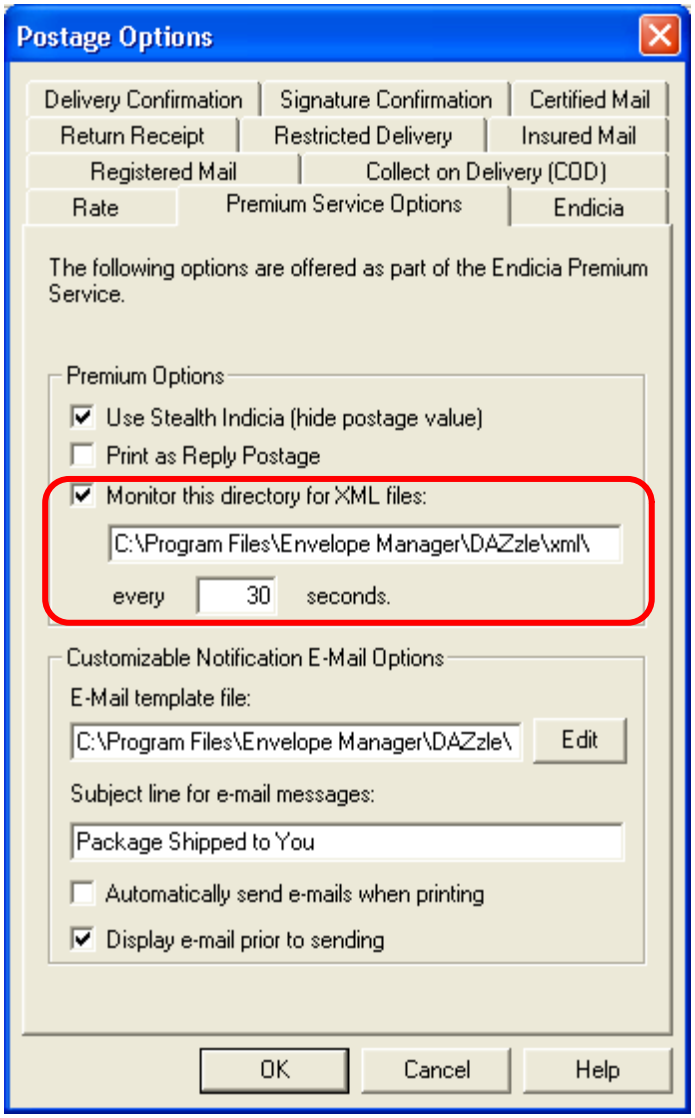
Once all these settings are correctly added to POS and SuperManager exporting orders is very simple. Just select the order or orders you wish to export from the SuperManager order list, right click and choose “XML Exchange” | “QuickBooks POS”. Note that QuickBooks POS will only accept orders that have been completely paid for. You will need to make sure that there are payment events in the order that document that the entire balance has been paid. Unpaid orders will result in an “Unbalance Receipt” error.

11.3. Dazzle

The SuperManager seamlessly integrates with DAZzle/Endicia using an XML interface requiring little or no user input. This is only available to DAZzle Premium subscribers. If you are not a DAZzle premium subscriber or the XML exchange interface does not met your needs you can also export information to and from DAZzle using text files as described in section 11.3.c.

11.3.a Preparing Dazzle for use with The SuperManager

Just a couple settings need to be adjusted in Dazzle to prepare it for receiving requests from SuperManager. Inside Dazzle click on “Postage Options” on the main toolbar. This should bring up a settings window. Select the “Premium Service Options” tab and enter the “Premium Options” as shown below.



Beyond that, the only thing that is required is to either instruct SuperManager to select a desired template that will work appropriately with the mail class you have selected, or open the template that you desire SuperManager to use before exporting to dazzle. See the Dazzle manual for information about compatibility of certain layouts with mail classes.

11.3.b Setup for Exporting to Dazzle

Only a few settings are required in order to set this up. These settings are described in section 6.6.a.

After entering these settings you will also need to follow the instructions in section 7.7.a for mapping your shipping methods.

11.3.c Using the Dazzle XML interface

Once the necessary settings are correct interfacing with Dazzle is seamless and simple as shown below.

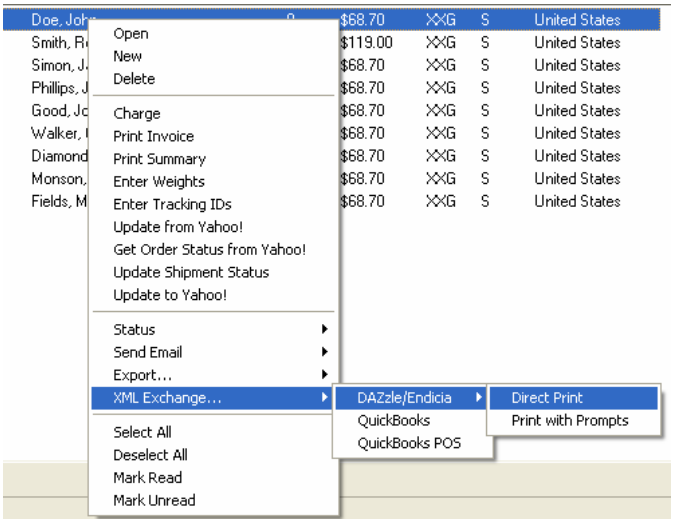
1. Make sure each order you want to export has the proper number of shipments in it. Information on working with multiple shipments in an order is given in section 8.1.b.

2. Select the order(s) you want to send to dazzle from the order list.

3. Right click and choose “XML Exchange” | “DAZzle/Endecia” and either “Direct Print” or “Print with prompts

    a. Direct Print – The shipments in the orders you selected will be automatically printed and the tracking numbers will be imported.

    b. Print with Prompts – You will be given the opportunity to change details of each order in DAZzle.



When you select one of these options The SuperManager will write an XML file to the folder set up previously and wait for DAZzle to write a response xml to the Windows temp folder. When DAZzle finishes writing this response file The SuperManager will automatically import it and add the tracking numbers from the exported orders into The SuperManager. A log file will come up to show you the tracking numbers that were imported and any errors that were encountered in the process. After closing the log file a prompt will appear asking if you would like to send these tracking numbers to Yahoo!. If you choose ‘Yes’ an email will be automatically sent to Yahoo!’s server telling it to update the information for the selected orders. Keep in mind that each time this update is sent an email is sent to your customer explaining the status of the orders.

11.3.d Text Export to DAZzle / Endicia

If for some reason you are unable to use the xml interface as described above you can also use a text format to interface with Dazzle. After mapping your shipping classes as shown in section 7.7.a you can export shipment information to DAZzle using the following steps.

1. When The SuperManager is installed the settings are initialized with an export to DAZzle format. You can check to make sure this format is still in your program settings by going to “View” | “Program Settings”, then selecting the “Export Formats” tab. If you do not see a DAZzle/Endicia format on the list you can use the following instructions to restore the format:

    a. Download the file http://www.thesupermanager.com/download/smx/dazzle_endicia.smx

    b. Switch to the tab “Preferences” in the program settings.

    c. Click the “Import SMX…” button and select the file you have just downloaded.

    d. If you are prompted whether to overwrite an existing format choose “Yes”.

2. Close the program settings by clicking “Ok” at the bottom of the dialog.

3. Select the order(s) you wish to export to DAZzle.

4. Right click on one of the orders that is highlighted and select “Export…” | “DAZzle/Endicia”. If you have changed the name of the export format select the name that you changed it to.

5. Choose a location to save the file and click “Save”.

6. If there are multiple shipments in one or more of the orders selected you will be asked if it should export all shipments for the selected orders. If there are some shipments that are not ready to ship you should say “No”. You will then be asked for each order with multiple shipments whether each of its shipments should be exported.

7. In DAZzle choose “File” | “Import” and select the file you just saved in The SuperManager.

11.3.e Text Import from DAZzle / Endicia

After printing postage in DAZzle/Endicia you can export the tracking numbers on the items you have shipped using the following steps:

1. In Dazzle/Endicia and click "Postage" and then "Postage Log".

2. Click the "Backup/Export" button and then click the "Export" radio button and click "OK"

3. Enter the start and end date and then click "Export"

4. In the file save dialog, change the "Save as type" dropdown menu to "Text, tab-delimited".

5. Enter a filename and then click "Save", noting the location of the file.

6. In the SuperManager, click “Program Settings…” and go to the “Import Formats” tab.

7. Check to see if there is already a text import format for DAZzle/Endecia defined. One is created in your settings by default when The SuperManager is installed. If you do not have an import for dazzle already you can follow these steps to restore it:

    a. Download the file http://www.thesupermanager.com/download/smx/dazzle_endicia.smx

    b. Switch to the tab “Preferences” in the program settings.

    c. Click the “Import SMX…” button and select the file you have just downloaded.

    d. If you are prompted whether to overwrite an existing format choose “Yes”.

8. Close the program settings by clicking “Ok” on the bottom of the dialog.

9. From the main SuperManager window select "File” | "Import“ | “Dazzle/Endicia" If you have changed the name of the import format select the name that you changed it to.

10. Select the file in the browse window that you exported in steps 4-5.

11. Click "Open" and the tracking id's will be imported for the dates you specified in step 3.

11.4. UPS WorldShip

The SuperManager interfaces with UPS WorldShip 10 and higher via the XML Auto-Import feature and via OBDC (text database) connection for all versions of WorldShip. The XML feature requires much less setup and is generally much easier to use than the ODBC connection.

11.4.a Using the UPS WorldShip Interface

Before exporting orders to UPS WorldShip the first time it is necessary to populate the settings described in section 6.6.c.

After entering these settings you will also need to follow the instructions in section 7.7.a for mapping your shipping methods.

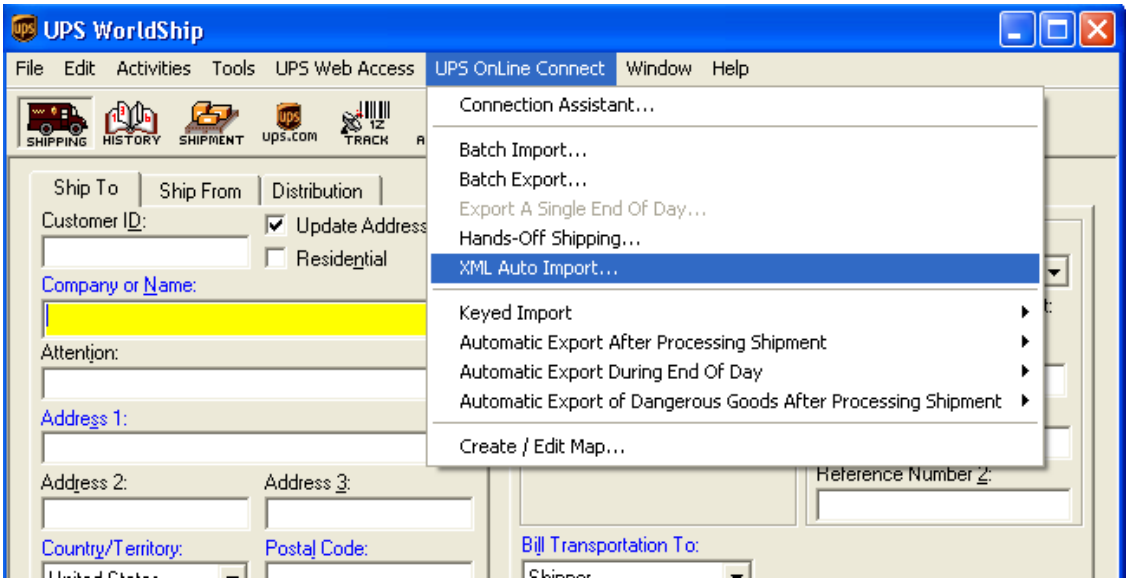
Once the necessary settings are correct interfacing with Dazzle is seamless and simple as shown below.

1. Make sure each order you want to export has the proper number of shipments in it. Information on working with multiple shipments in an order is given in section 8.1.b.

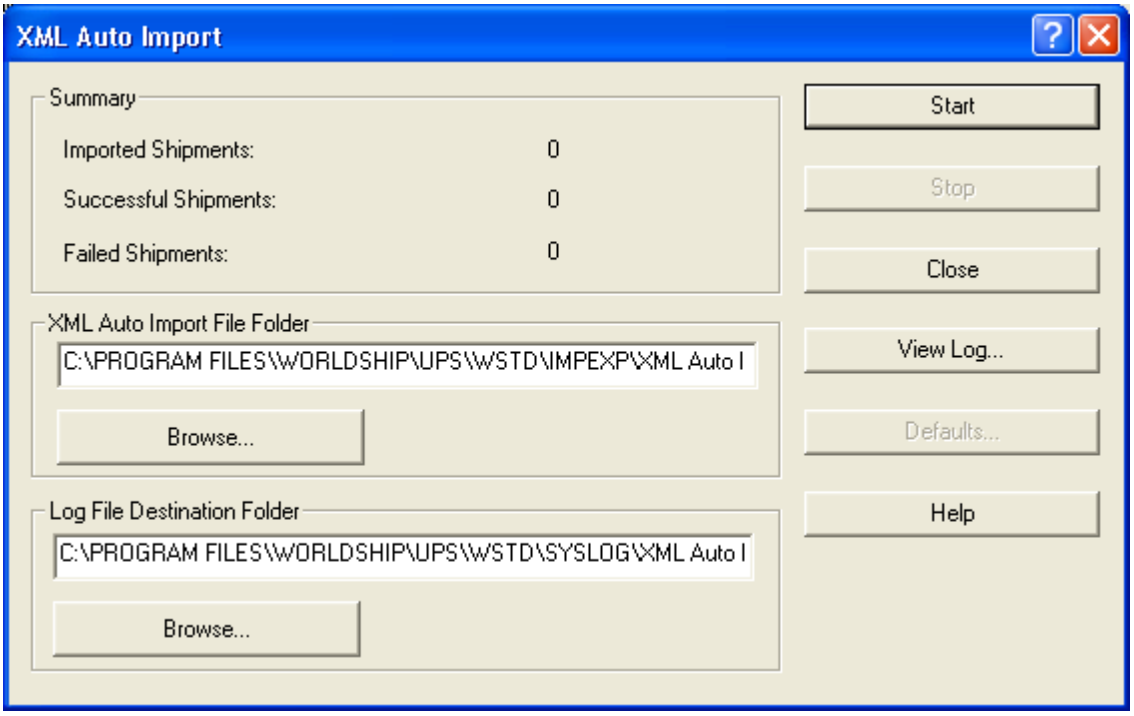
2. Select the order(s) you want to send to UPS WorldShip from the order list.

3. Right click and choose “XML Exchange” | “WorldShip” and either “Direct Print” or “Print with prompts

When you select this The SuperManager will write an XML file to the folder set up previously. A message box will appear stating that shipments have been exported. Do not press ‘OK’ to this message until after WorldShip is finished processing the shipments. If WorldShip is not opened open it and go to “UPS OnLine Connect” | “XML Auto Import…”



This will bring up the screen shown below. Make sure that the “XML Auto Import File Folder” is set to the folder that the file in The SuperManager program settings as described in section 6.6.c. This same folder should be specified in the “Log File Destination Folder. Once checking these settings press the “Start” button.



UPS should find the file written by The SuperManager and begin processing the shipments in it. WorldShip will then write a response file that The SuperManager will read and add the tracking numbers from the exported orders into The SuperManager. Once all shipments have been processed in WorldShip go back to The SuperManager and click 'OK' to allow it to proceed with this. A log file will come up to show you the tracking numbers that were imported and any errors that were encountered in the process. After closing the log file a prompt will appear asking if you would like to send these tracking numbers to Yahoo!. If you choose 'Yes' an email will be automatically sent to Yahoo!'s server telling it to update the information for the selected orders. Keep in mind that each time this update is sent an email is sent to your customer explaining the status of the orders.

11.4.b Connecting to UPS WorldShip Via an ODBC Connection

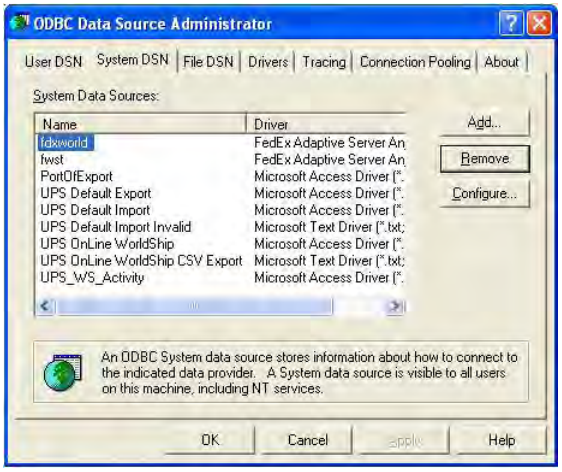
First you will need to create an ODBC database to make a connection with UPS WorldShip to use for the export from The SuperManager. Then you will need to create an import map in UPS WorldShip to import the information and finally you will need to create an export map in UPS WorldShip to export the data from UPS WorldShip for importing into The SuperManager. Once you have created the interfaces you will be able to work directly with UPS WorldShip to transfer data and you will save a significant amount of time in your daily work.

You can download and run the spreadsheet http://www.thesupermanager.com/download/odbc/ups/create_odbc_dsn_ups.xls to create the UPS WorldShip Connection or follow the instructions below to set it up manually. If you use the excel spreadsheet skip to the section "Create an import map in UPS WorldShip to import shipments".

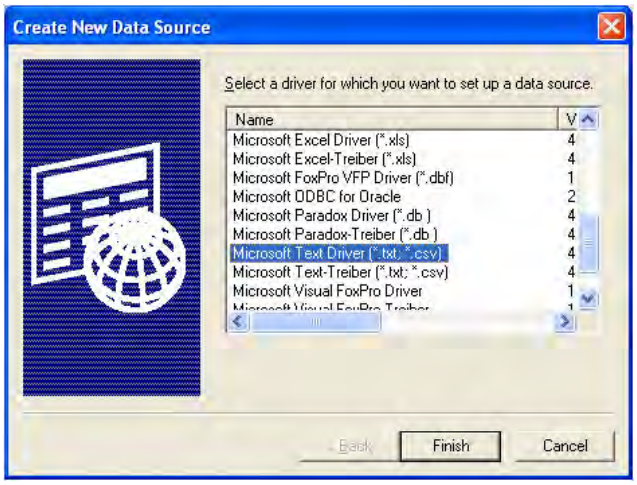
11.4.b.1. Create an Open Database Connection (ODBC) to interface with UPS WorldShip

1. First, click "Start", then "Settings" then "Control Panel". Once the "Control Panel" has opened, double click "Data Sources (ODBC)" to open the "ODBC Data Source Administrator" dialog or double click the "Administrative Tools" icon and then double click the "Data Sources" icon to open the "ODBC DS Admin" dialog.

2. Next, click the "System DNS" tab at the top of the “ODBC” dialog and then click the "Add…" button.



3. Now select "Microsoft Text Driver (*.csv, *.txt)" from the option list and then click "Finish"



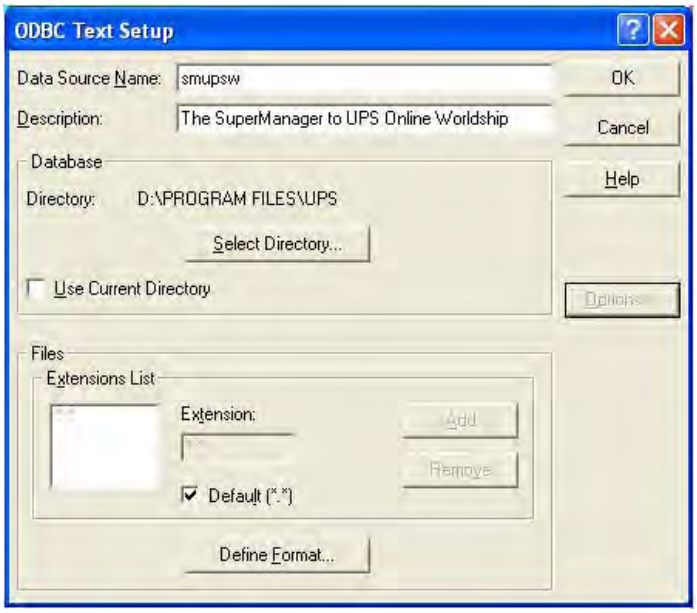
4. Download the following file: http://www.thesupermanager.com/download/odbc/ups/smupsw.txt and save it to the directory "C:\Program Files\UPS\" (or to the directory where your UPS program is located.

*Note - The file to be downloaded is a predefined header file that you can use with UPS WorldShip shipment imports and is to be used in conjunction with the predefined UPS Export format in The SuperManager. You can setup your own export formats in The SuperManager and use them for any type of export. (see section 6.2)

5. In the “ODBC Text Setup” dialog, enter "smupsw" in the "Data Source Name" and then enter a description, e.g. "The SuperManager to UPS Online Worldship”, in the "Description" edit box.

6. Next, click the "Use Current Directory" checkbox at the bottom left of the dialog and then click the "Select Directory…" button and browse to the directory "C:\Program Files\UPS\" (or to the directory where your UPS program is located) and then click "OK".

7. Now click the "Options>>" button at the bottom right of the "ODBC Text Setup" dialog and then click the "Define Format" button at the bottom of the dialog.

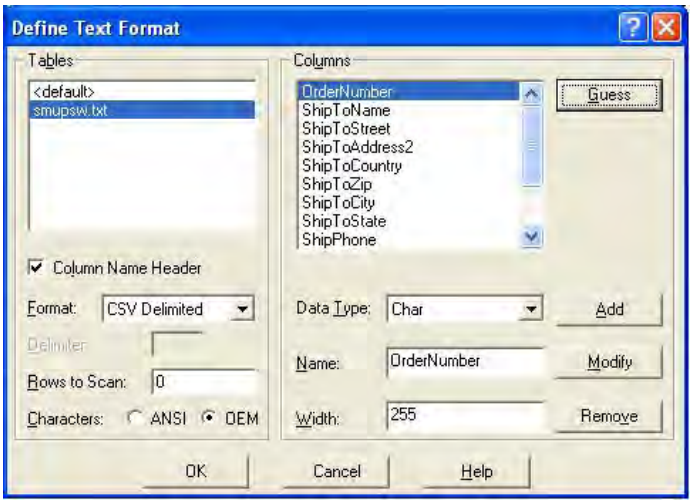


8. Now select the "smupsw.txt" file under the "Tables" tab and then click the "Column Name Header" check box and then change the Format to "CSV Delimited" if this option is available for you.

9. Next, click the "Guess" button to import the header names into the database connection.

10. Now click "OK" to close the "Define Text Format" Dialog. (You should ignore the following error if Windows displays it - "Failed to save table (null) to (null)")

11. Next, click "OK" to close the "ODBC Data Source Administrator" Dialog and then close the "Control Panel" dialog.



11.4.b.2. Create an import map in UPS WorldShip to import shipments

1. First, open the UPS WorldShip program and then click the "UPS OnLine Connect" menu at the top of the dialog and then select the "Create / Edit Map" menu item.

2. Next, click the "Import from ODBC Database" radio button and then select "Shipment" from the dropdown menu to indicate this import method is to be use for importing shipments.

3. Next, enter a descriptive name in the "Name" edit box and then click the "Create" button.

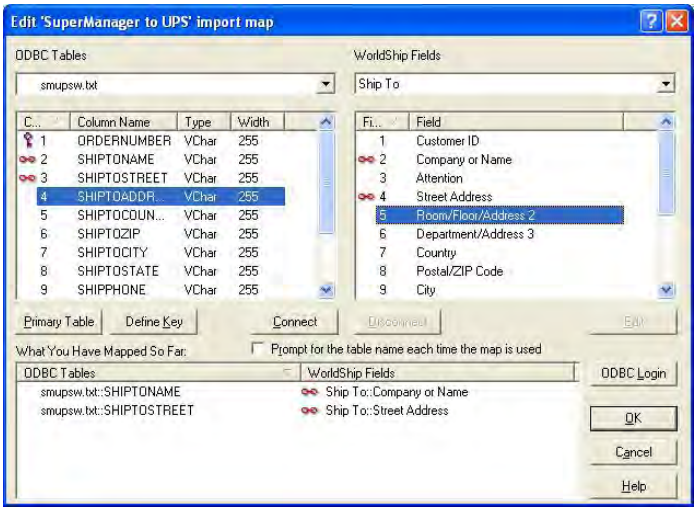
4. Now select the "smupsw" ODBC source from the list and then click "OK".

5. To begin mapping the ODBC to your UPS WorldShip import, you will need to define the Primary Key. Select the " CUSTOMERID" field under the "Column Name" heading and then click the "Define Key" button.

6. Next, you will need to map all of the variables on the left to the correct UPS variables on the right. Use the table below to “connect” or map the variables.

Begin by selecting the SuperManager variable on the left and then select the appropriate UPS variable on the right.

Then click “Connect” to create the connection. You will need to change the drop down menu under the “WorldShip Fields” label to select the different UPS WorldShip tables.



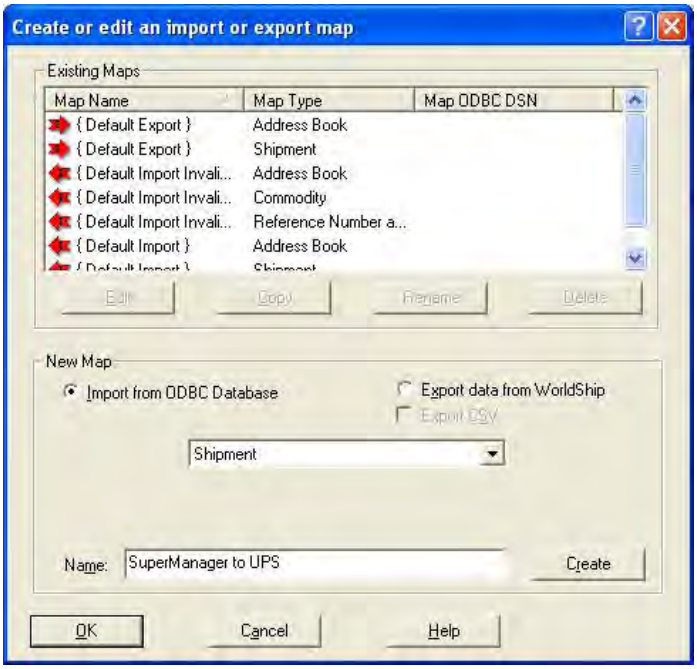
8. Now click "OK" to close the dialog and then click "OK" again to close the "Create or edit and import or export map" dialog.

11.4.b.3. Create an export map in UPS WorldShip to export shipments

1. First, open the UPS WorldShip program and then click the "UPS OnLine Connect" menu at the top of the dialog and then select the "Create / Edit Map" menu item.

2. Next, click the "Export data from WorldShip" radio button and check the "Export CSV" checkbox and then select "Shipment" from the drop down menu to indicate this export method is to be use for exporting shipments.

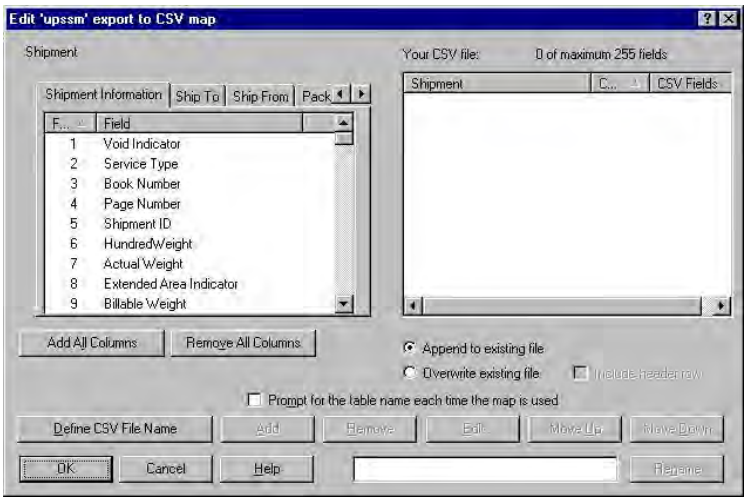
3. Next, enter a descriptive name ("UPS WorldShip to The SuperManager" in the "Name" edit box and then click the "Create" button.



4. Select the "Ship To" tab and click "Reference ID" and then click the "Add" button. Next, click the "Package" tab and click "Tracking Number" and then click the "Add" button. Next, click the "Shipment Information" tab and click "Pick Up Date" and then click the "Add" button. The pre-defined UPS import in The SuperManager is setup for these three import variables but you can create your own custom import formats to handle any parameters (see section 6.5, Import Formats, and section 12.1, The SuperManager Variable List, for all the possible variables to import back into The SuperManager)

5. Click the "Overwrite existing file" checkbox.

6. Next, click the "Define CSV File Name" button and specify a location for your file and then click "Save". This is the file you will select in The SuperManager to import your shipment information.



7. Now click "OK" to close the Export to CSV dialog and then click "OK" again to close the Map dialog.

11.4.b.4. Export to UPS WorldShip via the ODBC Connection

After you have mapped your Yahoo! shipping methods to the UPS shipping methods (see section 7.7.a) and once you have setup the database connection (see section 11.4), you can export orders to UPS OnLine WorldShip to print postage.

1. First, enter the order/shipment weights as described in section 8.0.

2. Next, right click on the selected order(s) again and click "Export", then "UPS". You should save the file to your UPS OnLine WorldShip program directory or the same directory used in section 11.4.

3. Next, open UPS OnLine WorldShip and click "Online Connect" and then click "Batch Import". Select the map you created in section 11.4 and then click "Process shipments automatically after import" and then click "Next" and follow the instructions to print UPS postage labels.

**Note - The method described above is recommended as the ideal way to automate your UPS postage label printing with* The SuperManager*. There are multiple ways to import data into UPS OnLine WorldShip. Refer to the UPS OnLine WorldShip user's manual for more information about importing data into UPS OnLine WorldShip to print postage (see "Keyed Import" and "Batch Import" in the UPS OnLine WorldShip help documentation)*

11.4.c Text Import from UPS WorldShip

After you have printed postage in UPS OnLine WorldShip, you can import the postage information back into The SuperManager to send to customers or to send back to Yahoo!

1. First, in "UPS OnLine WorldShip", click "OnLine Connect and then "Batch Export". Select the UPS export map you created in section 11.4 and follow the instructions to export the data.

2. Next, in The SuperManager, click "File" then "Import" and select the "UPS" import format. The shipping information will be imported in The SuperManager.

11.5. FedEx Ship Manager

11.5.a Setup FedEx Ship Manager Connection

Use the Export and Import functions to send and retrieve information from FedEx Ship Manager. This feature will automate your FedEx postage printing process and reduce your overall order processing time. To use this feature, you will need to first set up the connection between The SuperManager and FedEx Ship Manager.

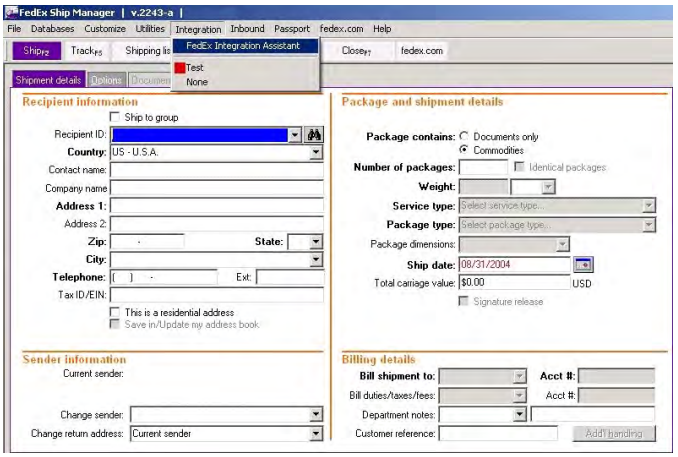
First you will need to create an import template in FedEx Ship Manager to specify what you will be importing. Then you will need to create an export template in FedEx Ship Manager to specify what you will be exporting for import into The SuperManager. Once you have created the interfaces you will be able to work directly with FedEx Ship Manager to transfer data and you will save a significant amount of time in your daily work.

Follow the instructions below to setup the FedEx Ship Manager Connection

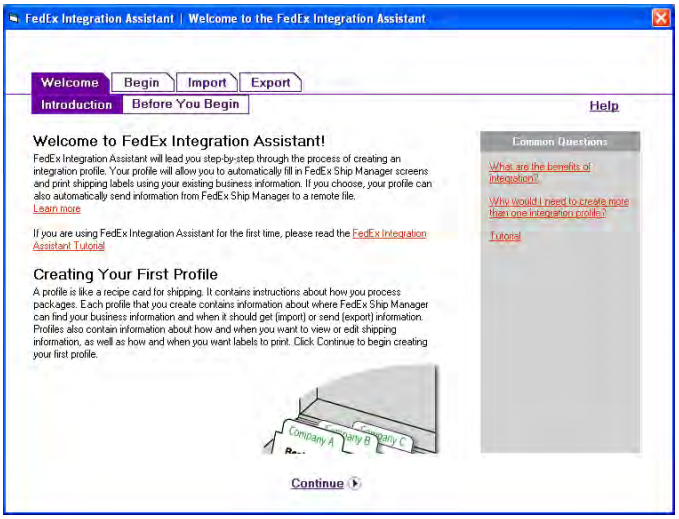
11.5.a.1. Create an Import Template in FedEx Ship Manager Software

The first step in importing or exporting data is creating or selecting a template. The recipient data fields in your import template must be displayed in the same order as the columns in your export file from The SuperManager. A FedEx Ship Manager export format has been included in the basic installation of The SuperManager but you can create new export formats as desired (see section 6.2, Export Formats).

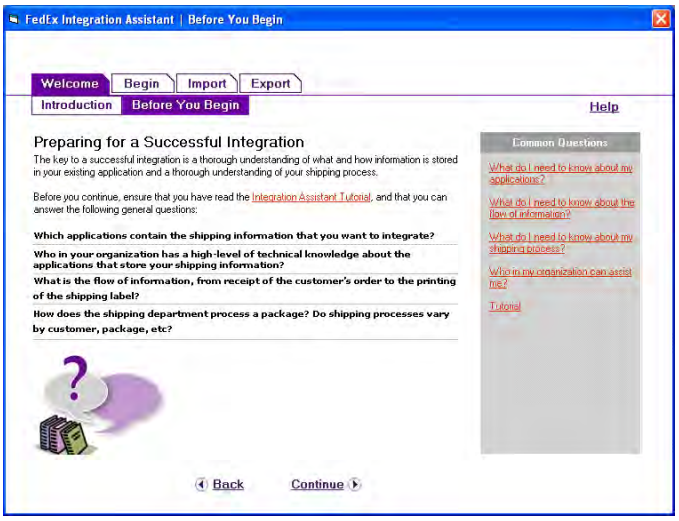
1. Launch FedEx Ship Manager Software and choose “Integration” | “FedEx Integration Assistant” from the main menu.



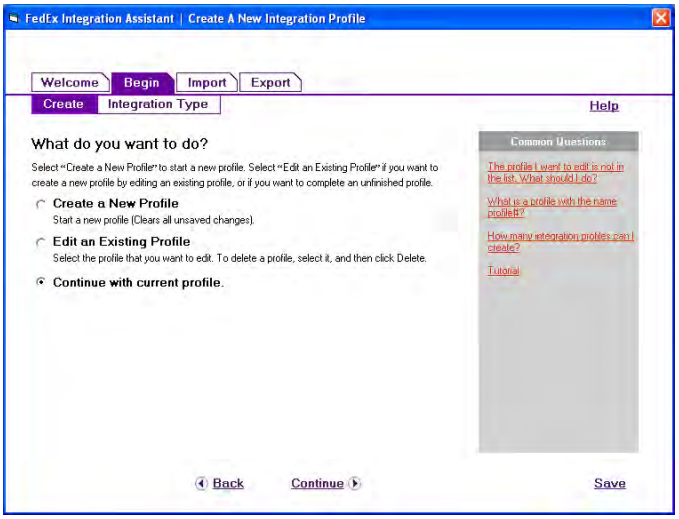
2. At the Welcome->Introduction screen, click Continue



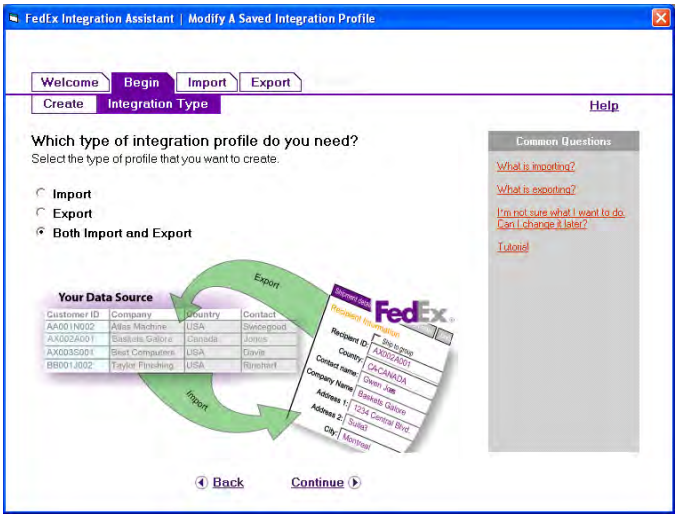
3. At the Welcome>Before You Begin screen click Continue


FedEx Integration Assistant | Before You Begin
Welcome
Begin
Import
Export
Introduction
Before You Begin
Help
Preparing for a Successful Integration
The key to a successful integration is a thorough understanding of what and how information is stored in your existing application and a thorough understanding of your shipping process.
Before you continue, ensure that you have read the Integration Assistant Tutorial, and that you can answer the following general questions:
Which applications contain the shipping information that you want to integrate?
Who in your organization has a high-level of technical knowledge about the applications that store your shipping information?
What is the flow of information, from receipt of the customer's order to the printing of the shipping label?
How does the shipping department process a package? Do shipping processes vary by customer, package, etc?
Common Questions
What do I need to know about my applications?
What do I need to know about the flow of information?
What do I need to know about my shipping process?
Who in my organization can assist me?
Tutorial
Back
Continue

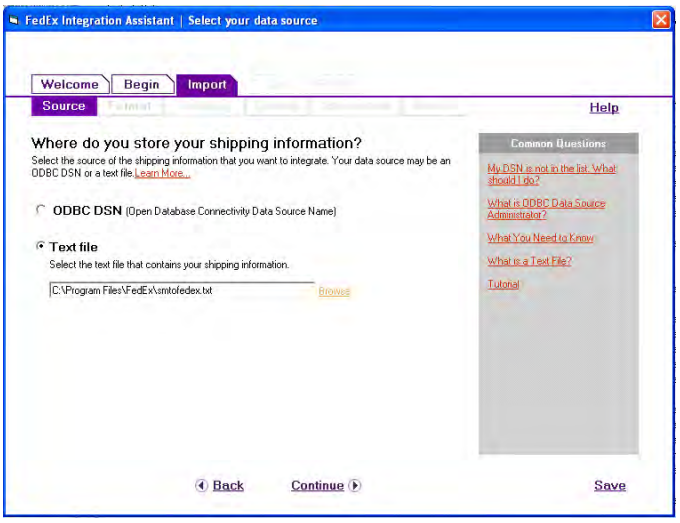
4. At the Begin>Create screen check "Create a New Profile" and then click "Continue"


FedEx Integration Assistant | Create A New Integration Profile
Welcome
Begin
Import
Export
Create
Integration Type
Help
What do you want to do?
Select "Create a New Profile" to start a new profile. Select "Edit an Existing Profile" if you want to create a new profile by editing an existing profile, or if you want to complete an unfinished profile.
Create a New Profile
Start a new profile (Clears all unsaved changes).
Edit an Existing Profile
Select the profile that you want to edit. To delete a profile, select it, and then click Delete.
Continue with current profile.
Common Questions
The profile I want to edit is not in the list. What should I do?
What is a profile with the name profile8?
How many integration profiles can I create?
Tutorial
Back
Continue
Save

5. At the Begin>Integration Type screen choose "Both Import and Export" then click Continue

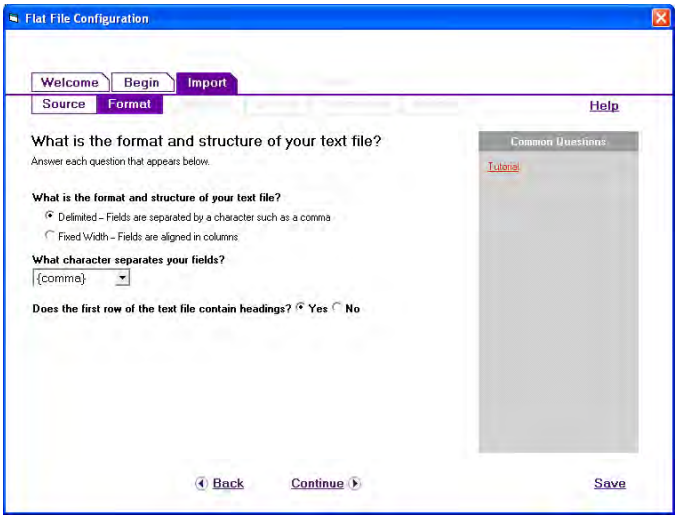


6. At the Import>Source screen, select "Text File". Next, click browse


FedEx Integration Assistant | Select your data source
Welcome
Begin
Import
Source
Help
Where do you store your shipping information?
Select the source of the shipping information that you want to integrate. Your data source may be an ODBC DSN or a text file. Learn More...
ODBC DSN (Open Database Connectivity Data Source Name)
Text file
Select the text file that contains your shipping information.
C:\Program Files\FedEx\smtofedex.txt
Browse
Common Questions
My DSN is not in the list. What should I do?
What is ODBC Data Source Administrator?
What You Need to Know
What is a Text File?
Tutorial
Back
Continue
Save

7. At the Import>Format screen, enter the following:

- Set "..format and structure of your text file?" to Delimited
- Set "..character .." to {comma}
- Set "..first row of the text file contain headings?" to Yes

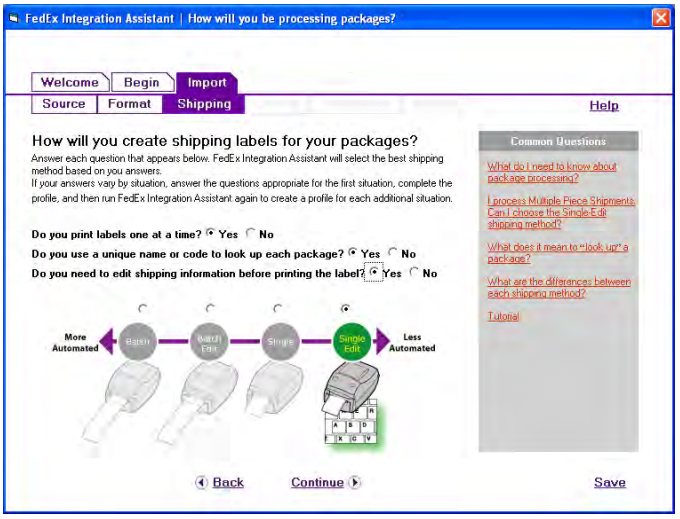

Flat File Configuration
Welcome
Begin
Import
Source
Format
Help
What is the format and structure of your text file?
Answer each question that appears below.
What is the format and structure of your text file?
Delimited – Fields are separated by a character such as a comma
Fixed Width – Fields are aligned in columns
What character separates your fields?
{comma}
Does the first row of the text file contain headings? Yes No
Common Questions
Tutorial
Back
Continue
Save

8. At the Import>Shipping screen we recommend the following:

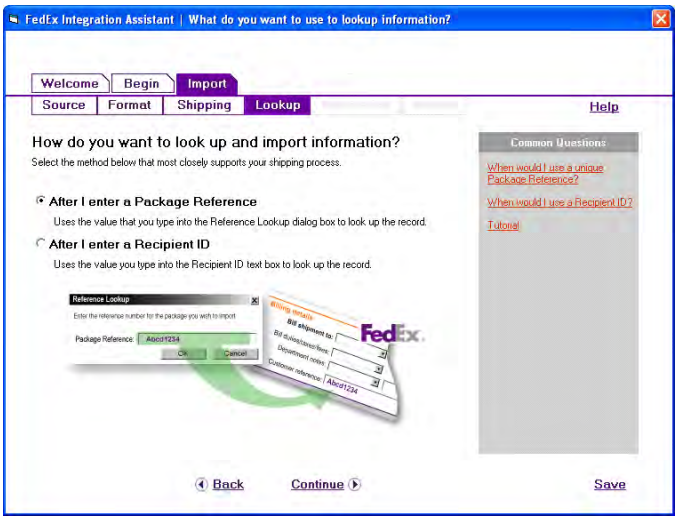
- Set "Do you print Labels one at a time?" to Yes
- Set "Do you use a unique name or code to look up each package?" to Yes
- Set "Do you need to edit shipping information before printing the label?" to Yes

Then click Continue

Note - You can edit these settings at a later time if you wish to import shipments into FedEx as batches for batch printing.


FedEx Integration Assistant | How will you be processing packages?
Welcome
Begin
Import
Source
Format
Shipping
Help
How will you create shipping labels for your packages?
Answer each question that appears below. FedEx Integration Assistant will select the best shipping method based on you answers.
If your answers vary by situation, answer the questions appropriate for the first situation, complete the profile, and then run FedEx Integration Assistant again to create a profile for each additional situation.
Do you print labels one at a time? Yes No
Do you use a unique name or code to look up each package? Yes No
Do you need to edit shipping information before printing the label? Yes No
More Automated
Batch
Batch Edit
Single
Single Edit
Less Automated
Common Questions
What do I need to know about package processing?
I process Multiple Piece Shipments. Can I choose the Single-Edit shipping method?
What does it mean to "look up" a package?
What are the differences between each shipping method?
Tutorial
Back
Continue
Save

9. At the Import>Lookup screen select "After I enter a Package Reference" then click Continue

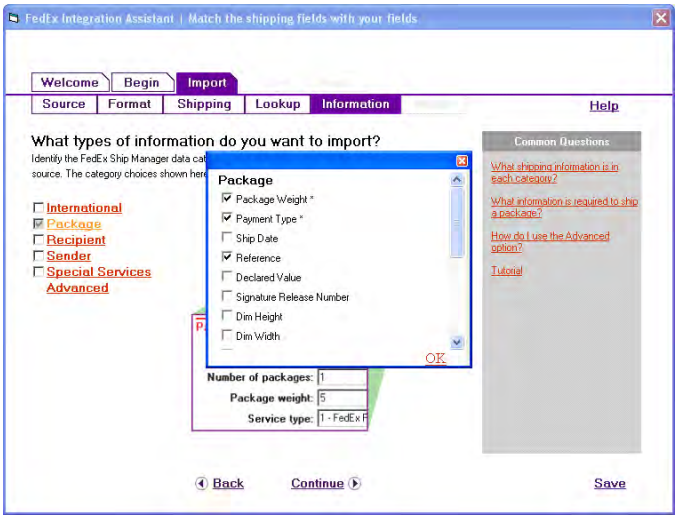

FedEx Integration Assistant | What do you want to use to lookup information?
Welcome
Begin
Import
Source
Format
Shipping
Lookup
Help
How do you want to look up and import information?
Select the method below that most closely supports your shipping process.
After I enter a Package Reference
Uses the value that you type into the Reference Lookup dialog box to look up the record.
After I enter a Recipient ID
Uses the value you type into the Recipient ID text box to look up the record.
Common Questions
When would I use a unique Package Reference?
When would I use a Recipient ID?
Tutorial
Back
Continue
Save

10. At the Import>Information screen perform the following:

Click on the word "Package" to open the field list window. Select the following fields:

- Package Weight
- Payment Type
- Reference
- Package Type
- Service Type

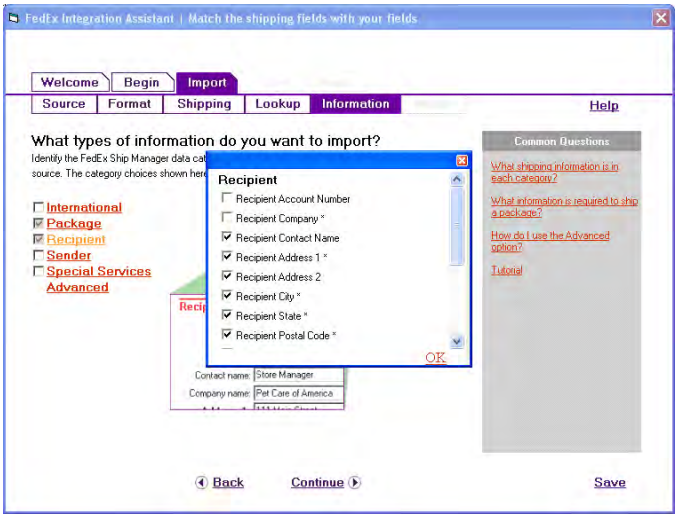
Click OK



11. Click on the word "Recipient" to open the field list window. Select the following fields:

- Recipient Contact Name
- Recipient Address 1
- Recipient Address 2
- Recipient City
- Recipient State
- Recipient Postal Code
- Recipient Phone
- Recipient Country
- Recipient Email

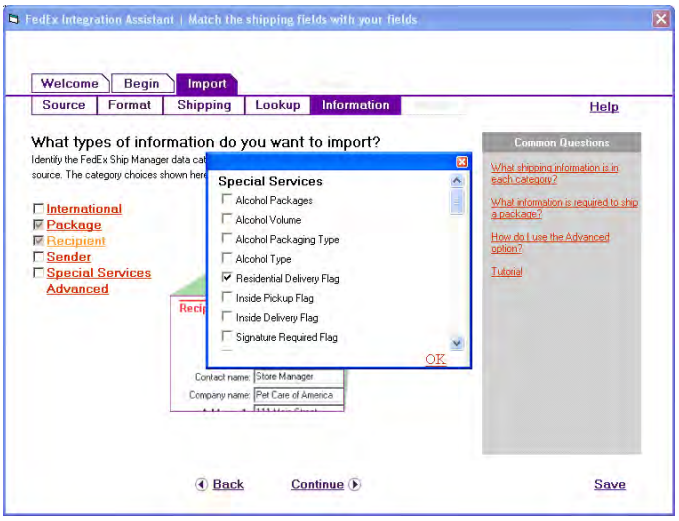
Click OK



12. Click on the word "Special Services" to open the field list window. Select the following field:

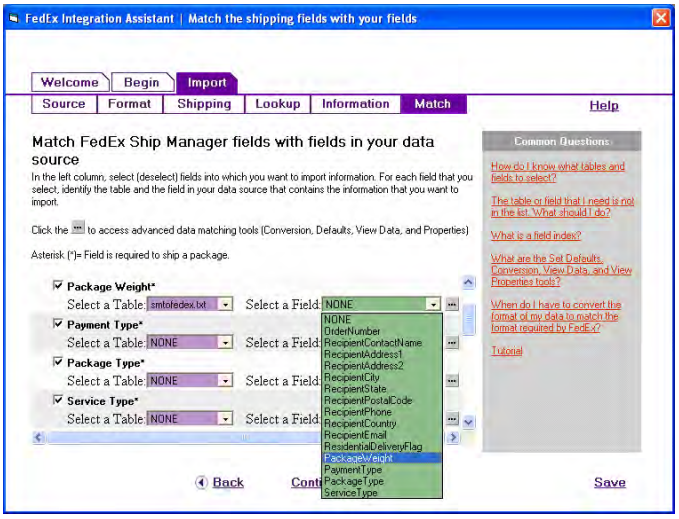
- Residential Delivery Flag

Click OK



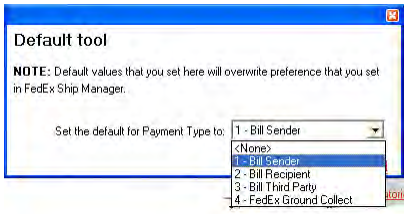
13. Click Continue

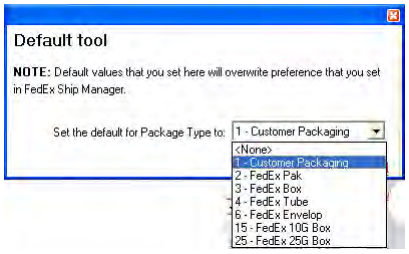
14. At the Import>Match screen set up the following Field Mapping

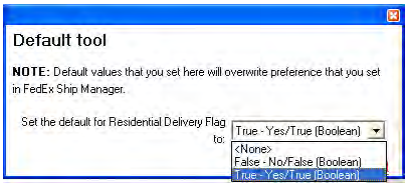

FedEx Integration Assistant | Match the shipping fields with your fields
Welcome
Begin
Import
Source
Format
Shipping
Lookup
Information
Match
Help
Match FedEx Ship Manager fields with fields in your data source
In the left column, select (deselect) fields into which you want to import information. For each field that you select, identify the table and the field in your data source that contains the information that you want to import.
Click the ... to access advanced data matching tools (Conversion, Defaults, View Data, and Properties)
Asterisk (*)= Field is required to ship a package.
Package Weight*
Payment Type*
Package Type*
Service Type*
Select a Table:
Select a Field:
NONE
smtofedex.txt
NONE
OrderNumber
RecipientContactName
RecipientAddress1
RecipientAddress2
RecipientCity
RecipientState
RecipientPostalCode
RecipientPhone
RecipientCountry
RecipientEmail
ResidentialDeliveryFlag
PackageWeight
PaymentType
PackageType
ServiceType
Common Questions
How do I know what tables and fields to select?
The table or field that I need is not in the list. What should I do?
What is a field index?
What are the Set Defaults, Conversion, View Data, and View Properties tools?
When do I have to convert the format of my data to match the format required by FedEx?
Tutorial
Back
Save

FedEx Field Name	SELECT A TABLE	SELECT A FIELD
Package Weight	smtofedex.txt	PackageWeight
Payment Type	None	None*
Package Type	None	None*
Service Type	smtofedex.txt	ServiceType
Recipient Account Number	smtofedex.txt	OrderNumber
Recipient Contact Name	smtofedex.txt	RecipientContactName
Recipient Address 1	smtofedex.txt	RecipientAddress1
Recipient Address 2	smtofedex.txt	RecipientAddress2
Recipient City	smtofedex.txt	RecipientCity
Recipient State	smtofedex.txt	RecipientState
Recipient Postal Code	smtofedex.txt	RecipientPostalCode
Recipient Phone	smtofedex.txt	RecipientPhone
Recipient Country	smtofedex.txt	RecipientCountry
Recipient Email	smtofedex.txt	RecipientEmail
Residential Delivery Flag	smtofedex.txt	None *

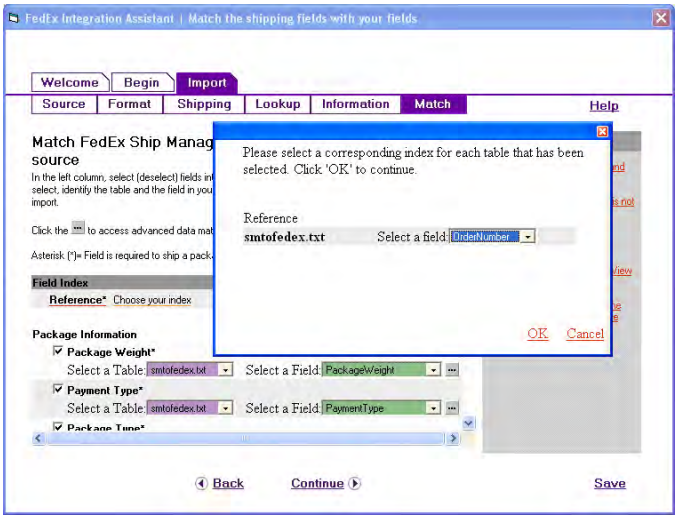
*Click the small button with the three dots to the right of this field and then select "Set Default" to define the default value for this field


Default tool
NOTE: Default values that you set here will overwrite preference that you set in FedEx Ship Manager.
Set the default for Payment Type to:
1 - Bill Sender
<None>
1 - Bill Sender
2 - Bill Recipient
3 - Bill Third Party
4 - FedEx Ground Collect


Default tool
NOTE: Default values that you set here will overwrite preference that you set in FedEx Ship Manager.
Set the default for Package Type to:
1 - Customer Packaging
<None>
1 - Customer Packaging
2 - FedEx Pak
3 - FedEx Box
4 - FedEx Tube
6 - FedEx Envelop
15 - FedEx 10G Box
25 - FedEx 25G Box


Default tool
NOTE: Default values that you set here will overwrite preference that you set in FedEx Ship Manager.
Set the default for Residential Delivery Flag to:
True - Yes/True (Boolean)
<None>
False - No/False (Boolean)
True - Yes/True (Boolean)

15. Click on the Continue button. You will be prompted to select an index for the smtofedex.txt table. Select "OrderNumber" from the Drop-down list and click OK



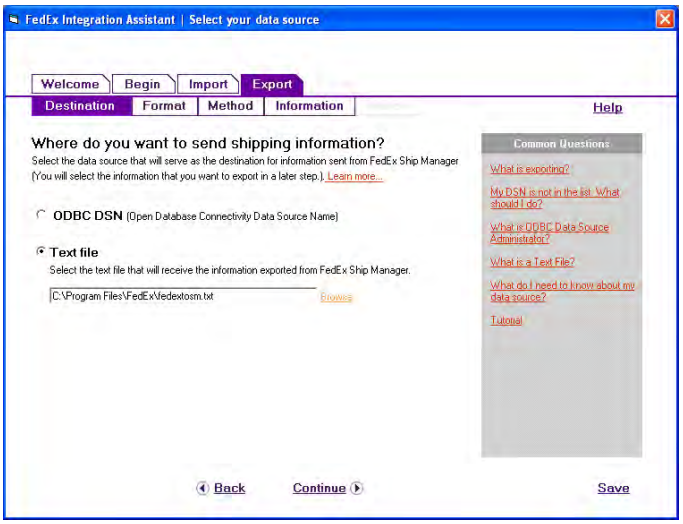
Congratulations, you have completed setting up the import settings for the FedEx connection! Continue below to setup the export settings for the FedEx connection.

11.5.a.2. Create an Export Template in FedEx Ship Manager Software

You will now need to create a template export text file.

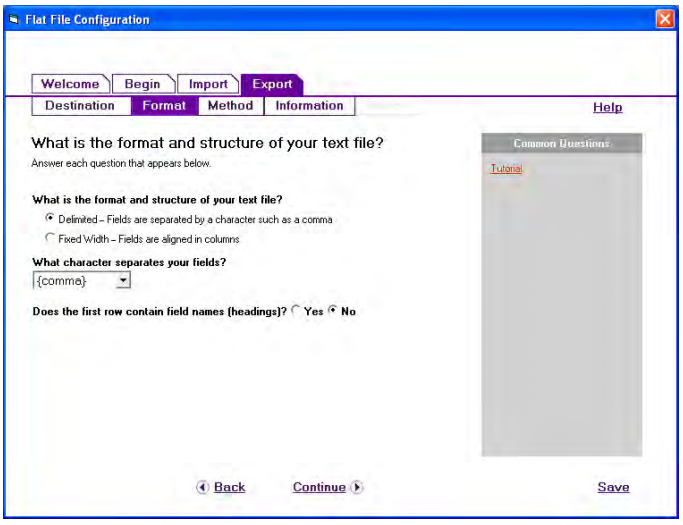
1. Open Windows Notepad text editor. On the first line, enter "order number, tracking number" (without the quotes), and then save the file to the same location where you have stored your "smtofedex.txt" file. Enter the filename "fedextosm.txt" and then click "Save". Now close notepad and switch back to the FedEx integration assistant.

2. At the Export>Destination screen select "Text File" and then click "Browse" and select the file "fedextosm.txt" that you just created in the step above.


FedEx Integration Assistant | Select your data source
Welcome
Begin
Import
Export
Destination
Format
Method
Information
Help
Where do you want to send shipping information?
Select the data source that will serve as the destination for information sent from FedEx Ship Manager (You will select the information that you want to export in a later step.). Learn more...
ODBC DSN (Open Database Connectivity Data Source Name)
Text file
Select the text file that will receive the information exported from FedEx Ship Manager.
C:\Program Files\FedEx\fedextosm.txt
Browse...
Common Questions
What is exporting?
My DSN is not in the list. What should I do?
What is ODBC Data Source Administrator?
What is a Text File?
What do I need to know about my data source?
Tutorial
Back
Continue
Save

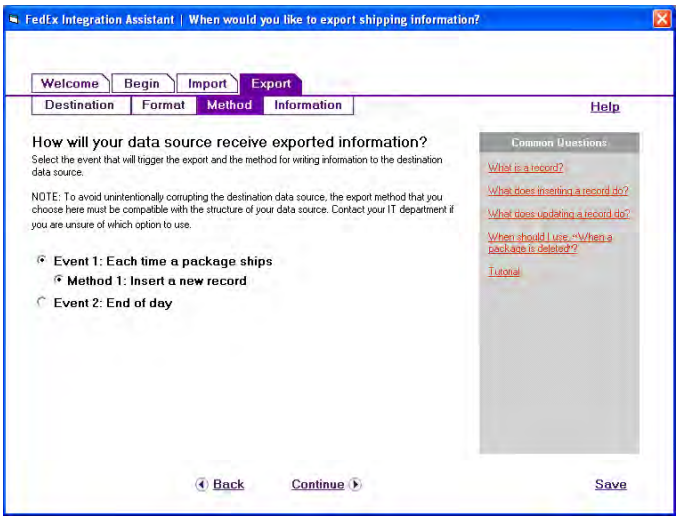
3. At the Export>Format screen, enter the following:

- Set "..format and structure of your text file?" to Delimited
- Set "..character .." to {comma}
- Set "..first row of the text file contain headings?" to No



4. At the Export>Method screen select "Event 1: Each time a package ships" and "Method 1: Insert New Record"

Note - You can change these settings at any time if you prefer to export shipping information at the end of the day.


FedEx Integration Assistant | When would you like to export shipping information?
Welcome
Begin
Import
Export
Destination
Format
Method
Information
Help
How will your data source receive exported information?
Select the event that will trigger the export and the method for writing information to the destination data source.
NOTE: To avoid unintentionally corrupting the destination data source, the export method that you choose here must be compatible with the structure of your data source. Contact your IT department if you are unsure of which option to use.
Event 1: Each time a package ships
Method 1: Insert a new record
Event 2: End of day
Common Questions
What is a record?
What does inserting a record do?
What does updating a record do?
When should I use "When a package is deleted"?
Tutorial
Back
Continue
Save

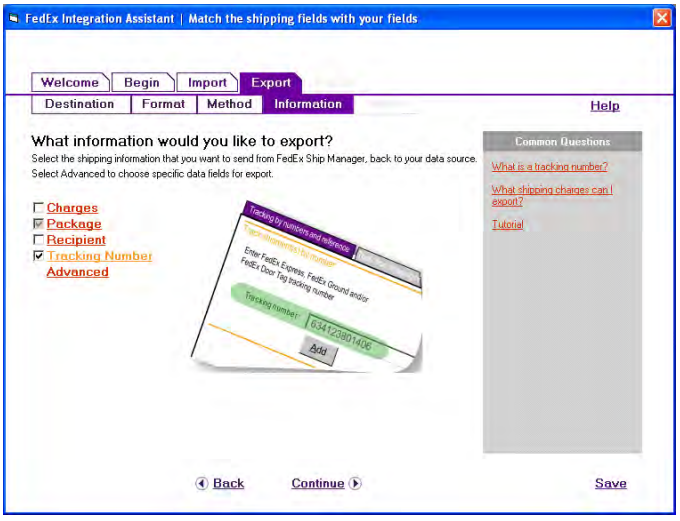
5. At the Export>Information screen perform the following:

Click on the word "Package" to open the field list window. Select the following fields:

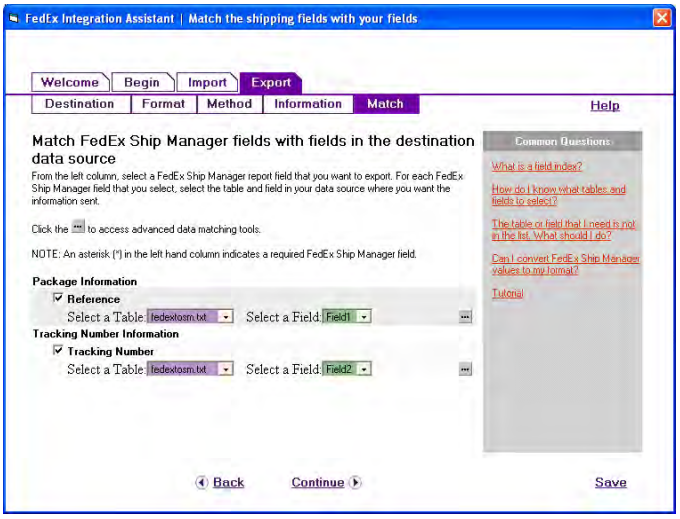
- Reference

Click on the word "Tracking Number" to open the field list window. Select the following field:

- Tracking Number



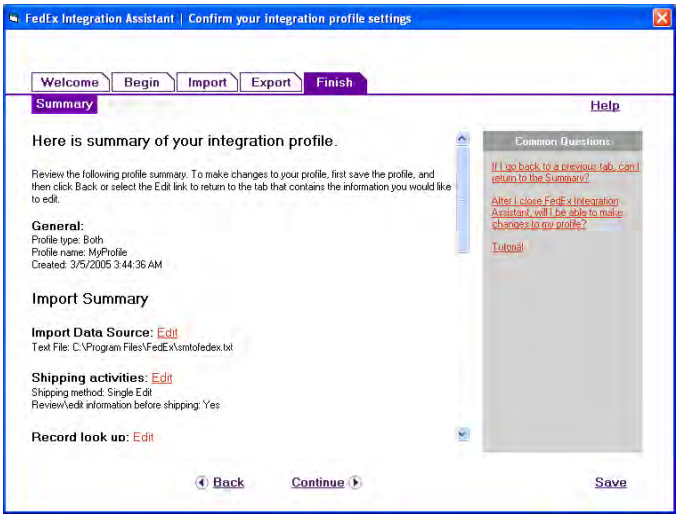
6. At the Export>Match screen set up the following mapping:


FedEx Integration Assistant | Match the shipping fields with your fields
Welcome
Begin
Import
Export
Destination
Format
Method
Information
Match
Help
Match FedEx Ship Manager fields with fields in the destination data source
From the left column, select a FedEx Ship Manager report field that you want to export. For each FedEx Ship Manager field that you select, select the table and field in your data source where you want the information sent.
Click the ... to access advanced data matching tools.
NOTE: An asterisk (*) in the left hand column indicates a required FedEx Ship Manager field.
Package Information
Reference
Select a Table: fedextosm.txt
Select a Field: Field1
Tracking Number Information
Tracking Number
Select a Table: fedextosm.txt
Select a Field: Field2
Common Questions
What is a field index?
How do I know what tables and fields to select?
The table or field that I need is not in the list. What should I do?
Can I convert FedEx Ship Manager values to my format?
Tutorial
Back
Continue
Save

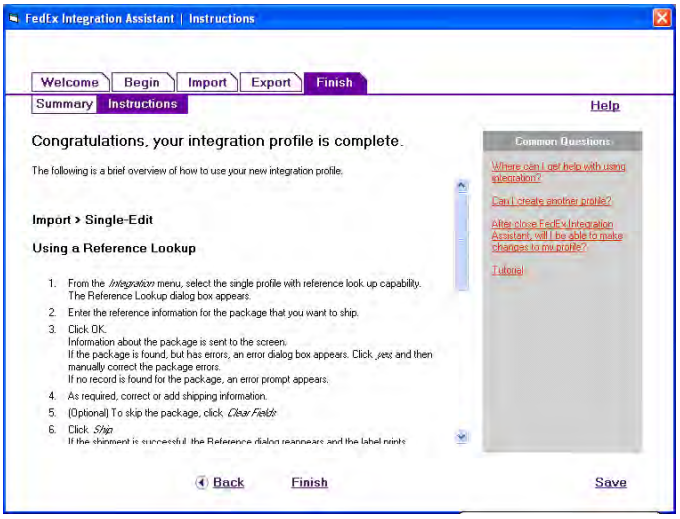
FedEx Field Name	SELECT A TABLE	SELECT A FIELD
Reference	fedextosm.txt	Field1
Tracking Number	fedextosm.txt	Field2

7. Click Continue

8. At the Finish>Summary screen click Continue


FedEx Integration Assistant | Confirm your integration profile settings
Welcome
Begin
Import
Export
Finish
Summary
Help
Here is summary of your integration profile.
Review the following profile summary. To make changes to your profile, first save the profile, and then click Back or select the Edit link to return to the tab that contains the information you would like to edit.
General:
Profile type: Both
Profile name: MyProfile
Created: 3/5/2005 3:44:36 AM
Import Summary
Import Data Source: Edit
Text File: C:\Program Files\FedEx\smtofedex.txt
Shipping activities: Edit
Shipping method: Single Edit
Review\edit information before shipping: Yes
Record look up: Edit
Common Questions:
If I go back to a previous tab, can I return to the Summary?
After I close FedEx Integration Assistant, will I be able to make changes to my profile?
Tutorial
Back
Continue
Save

9. At the Finish>Instructions screen click Finish. You will be prompted to save your new profile under a name you specify. Name the profile "SuperManager" to make it easy to remember, then click OK


FedEx Integration Assistant | Instructions
Welcome
Begin
Import
Export
Finish
Summary
Instructions
Help
Congratulations, your integration profile is complete.
The following is a brief overview of how to use your new integration profile.
Import > Single-Edit
Using a Reference Lookup
1. From the Integration menu, select the single profile with reference look up capability. The Reference Lookup dialog box appears.
2. Enter the reference information for the package that you want to ship.
3. Click OK.
Information about the package is sent to the screen.
If the package is found, but has errors, an error dialog box appears. Click yes and then manually correct the package errors.
If no record is found for the package, an error prompt appears.
4. As required, correct or add shipping information.
5. (Optional) To skip the package, click Clear Fields.
6. Click Ship.
Common Questions:
Where can I get help with using integration?
Can I create another profile?
After close FedEx Integration Assistant, will I be able to make changes to my profile?
Tutorial
Back
Finish
Save

11.5.b Exporting to FedEx

After you have mapped your Yahoo! shipping methods to the FedEx shipping methods (see section 7.7.a) and once you have setup the FedEx connection(see section 11.3), you can export orders to FedEx Ship Manager to print postage.

1. First, enter the order/shipment weights as described in section 8.0 in The SuperManager.
2. Next, right click on the selected order(s) and click "Export", then "FedEx". You should save the file to your FedEx Ship Manager program directory.
3. Start FedEx Ship Manager
4. Click on the Integration Menu
5. Select the Profile created in the previous steps (named SuperManager).

6. You will be prompted with a Reference Lookup window.

7. Enter the SuperManager's Order Number for an order that is approved, then press Enter.

Next, in The SuperManager, click "File" then "Import" and select the "FedEx" import format. The shipping information will be imported in The SuperManager.

12.0 Appendix

12.1. The SuperManager Variable List

12.1.a Company and General Information

The SuperManager Variable / Replacement Code	Explanation	Example
company_name	Company name	SuperWare
company_storeid	Yahoo store id	supermanager
company_userid	Yahoo login id	supermanager
company_address1	Company address 1	Suite 000
company_address2	Company address 2	111 Penny Lane
company_street	Combination of address 1 and 2	111 Penny Lane; Suite 000
company_address	Complete Address	Suite 000 111 Penny Lane Penny City, CA 11111
company_city	Company city	Penny City
company_state	Company state	CA
company_zip	Company zip code	11111
company_country_code	Company country code	US
company_country	Company country	United States
company_website	Company website	http://www.thesupermanager.com
company_email	Company email address	info@thesupermanager.com
company_phone_number	Phone number w/o spaces	8797971111
company_phone	Company phone number	(879)797-1111
company_fax	Company fax number	(789)798-2222
todays_date	Date that the export/report was generated	11-Jan-04
todays_date[*format*]	Date that the export/report was generated	See date format descriptors below
page_break	Inserts a page break into the report	

12.1.b Order Information

The SuperManager Variable / Replacement Code	Explanation	Example
order_id	Order id	SW111 or SW111-manual if a manual order (fax, phone, ebay, etc.)
order_id_noprefix	Order id without a prefix	111 or 111-manual
order_alt_id	Alternative order id	123-293-2222
order_type	Order type	eStore, phone, fax, email, etc.
order_status	Order status	Open, Charged, Paid, Shipped, etc.
order_date	Order date	10 Jan 2004
order_date[*format*]	Order date	See date format descriptors below
order_time	Order time	10:05:59
order_comments	Customer comments	Please put package inside door but do not let cat out!
order_merchant_comments	Merchant comments	We instructed UPS to leave it on the door

The SuperManager Variable / Replacement Code	Explanation	Example
order_notes	Merchant notes	Sent email template 'backordered' 13 Apr 2006
order_referrer	Referrer	www.google.com, www.yahoo.com
order_entrypoint	Entry Point	www.store.com/widgets.html
order_ip_address	IP address used to make order	192.168.0.0
order_http_agent	Yahoo! http Agent info or rev share url	
order_rev_share	Yahoo! http Agent info or rev share url	
ship_first_name	Ship to first name	John
ship_last_name	Ship to last name	Smith
ship_name	Ship to full name	John Smith
ship_company	Ship to company	Smith's Market
ship_address1	Shipping address 1	Suite 000
ship_address2	Shipping address 2	111 Penny Lane
ship_city	Shipping city	Penny City
ship_state	Shipping state	CA
ship_zip5	Shipping zip code, first 5 digits	11111
ship_zip	Shipping zip code	11111-1111
ship_country_code	Shipping country code	US
ship_country	Shipping country	United States
ship_address	Shipping address combined	Suite 000 111 Penny Lane Penny City, CA 11111
ship_street	Combination of address 1 and 2	111 Penny Lane; Apt. A
ship_phone_number	Phone number w/o spaces	8797911111
ship_phone	Shipping phone number	(879)797-1111
ship_customs	All custom variables received from the shipping checkout page	Where did you find us?: Google Your favorite color?: Red
ship_custom*n*	The n^{th} custom variable choice from the shipping checkout page	(For ship_custom1 as in the example above) Google
bill_first_name	Bill to first name	John
bill_last_name	Bill to last name	Smith
bill_name	Bill to full name	John Smith
bill_company	Bill to company	Smith's Market
bill_address1	Billing address 1	Suite 000
bill_address2	Billing address 2	111 Penny Lane
bill_city	Billing city	Penny City
bill_state	Billing state	CA
bill_zip5	Billing zip code, first 5 digits	11111
bill_zip	Billing zip code	11111-1111
bill_country_code	Billing country code	US
bill_country	Billing country	United States
bill_address	Billing address combined	Suite 000 111 Penny Lane Penny City, CA 11111
bill_street	Combination of address 1 and 2	111 Penny Lane; Apt. A

The SuperManager Variable / Replacement Code	Explanation	Example
bill_phone_number	Phone number w/o spaces	8797911111
bill_phone	Shipping phone number	(879)797-1111
bill_customs	All custom variables received from billing checkout page	Where did you find us?: Google Your favorite color?: Red
bill_custom*n*	The nth custom variable choice from the billing checkout page	(For bill_custom1 as in the example above) Google
order_email	Customer/Order Email	customer@aol.com
order_ship_method	Shipping method	Ground Shipping
order_ship_residential order_ship_residential_flag order_ship_residential_boolean	Defaults to true. Set if there is a custom shipping/billing variable called “Residential”	"Yes" or "No" “1” or “0” “True” or “False”
order_ship_class	Shipment Class	Carrier shipping class; ground, overnight
order_opt_out order_opt_out_flag order_opt_out _boolean	Defaults to true. Set if there is a custom shipping/billing variable called “Opt Out”	"Yes" or "No" “1” or “0” “True” or “False”
order_tracking_link	Tracking link	"Google Adwords kw - Order Processing"
order_shipments	Number of shipments in order	1,2,3 etc.
order_postage_amount	Order postage amount paid	$5.49
order_subtotal	Order subtotal	$49.99
order_tax_total	Order tax total	$3.94
order_giftwrap_total	Order gift wrap total	$3.95
order_discount_total	Order discount total	$3.95
order_adjustment_total	Order adjustment total	-$10.00
order_coupon_total	Order coupon total	$0.00
order_giftcert_total	Order gift certificates total	$15.00
order_shipping_total	Order shipping total	$5.95
order_credit_total	Order credit total	$5.00
order_total	Order total	$59.88
order_taxable_sales	Total taxable sales in the order	
order_coupon_id	Coupon ID	"freeshipping", "holidaysale"
order_coupon_description	Coupon Description	Free Shipping, 10% holiday sale
order_coupon_value	Coupon Value	4.95, 10.65
order_gift order_gift_flag order_gift_boolean	Gift	"Yes" or "No" “1” or “0” “True” or “False”
order_gift_message	Gift Message	"Happy Birthday, see you soon"
bill_method_account	The account associated with the bill method for the order (from the store settings Accounting Export tab)	MasterCard, Visa, PayPal, etc.
bill_method	Payment Method	MasterCard, Visa, PayPal, etc.
bill_cardnumber_mask	Credit Card Number	xxxxxxxxxxxx1234
bill_cardnumber	Credit Card Number	5414123412341234
bill_cardexpiration	Credit Card Expiration	mm/yyyy
bill_avs_response	AVS Response	YYY, NNN, NYZ, etc

The SuperManager Variable / Replacement Code	Explanation	Example
bill_cvv_response	CVV Response	M, S, etc
bill_auth_number	Authorization number	123456
order_amount_paid	Total of the payments received	$100.00
order_amount_credited	Total of the credits given	$10.00
order_payment_due	Total due minus total paid.	$100.00
order_repeat_orders	Number of repeat orders by the same customer	5
order_repeat_order_list	List of repeat orders by the same customer	4562, 6754, 8392, 10232
order_items	Number of items in order	1, 5, 20, etc.
order_item_list	Quick list of items in an order, Item code(Qty)	WID_111(10), WID_222(9)
backordered_items	Number of backordered items	
backordered_item_list	Quick list of backordered items in an order, Item code(Qty)	WID_111(10), WID_222(9)
order_scriptable[]	Special keyword to ensure the variable(s) inside the brackets compatable with java or other scripting languiages	order_scriptable[order_comments] would ensure that quotes and other reserved characters in the comments are not passed into the script.

12.1.b.1. Order Item Information

When used in a text format a new line is created for each total in the order. When used in an HTML report a new row is create for each total in the order.

The SuperManager Variable / Replacement Code	Explanation	Example
item_id	Item ID	thesprmngr
item_code	Item code	THE_SUPER
item_description	Item description	Powerful order manager...
item_url	Item url	www.thesupermanager.com/thesprmngr.html
item_thumb	Item thumbnail picture including any meta data	www.thesupermanager.com/thesprmngr.gif
item_thumb_src	Item thumbnail picture	www.thesupermanager.com/thesprmngr.gif
item_options	Item options separated by carriage returns	Color = Red Size = Large (+1.00)
item_options_trim	Item options separated by carriage returns with any text in between parenthesis removed (as in incremental pricing)	Color = Red Size = Large
item_options_csv	Item options separated by commas	Color = Red, Size = Large (+1.00)
item_options_csv_trim	Item options separated by commas with any text in between parenthesis removed (as in incremental pricing)	Color = Red, Size = Large
item_option_choices	Item option choices separated by spaces	Red Large (+1.00)

The SuperManager Variable / Replacement Code	Explanation	Example
item_option_choices_trim	Item option choices separated by spaces with any text in between parenthesis removed (as in incremental pricing)	Red Large
item_option*n*	The nth item option choice	For item_option2 in the example above: Large (+1.00)
item_quantity_available	Number of items available	99
item_quantity_backordered	Number of items backordered	1
item_quantity	Item quantity	1
item_price	Item price	399
item_ext_price	= quantity * price	399
item_cost	Item cost	300
item_ext_cost	= quantity * cost	300
item_taxable item_taxable_flag item_taxable_boolean	Item taxable	"Yes" or "No" “1” or “0” “True” or “False”
item_backordered item_backordered_flag item_backordered_boolean	Item backordered	"Yes" or "No" “1” or “0” “True” or “False”
Item_backordered_date	Date the items are expected to ship	12 Dec2003
Item_backordered_date[*format*]	Date the items are expected to ship	12/12/2003
item_shipment_number	Shipment Number	1, 2, 3, etc
item_shipped item_shipped_flag item_shipped_boolean	Item shipped	"Yes" or "No" “1” or “0” “True” or “False”
item_weight_poundounce	Item weight in pounds ounces	12 lbs 8 oz
item_weight_pound	Item weight in pounds	12.5 lbs
item_weight_ounce	Item weight in ounces	200 oz
item_weight_kgram	Item weight in kilograms	5.7 kgrams
item_weight_gram	Item weight in grams	5700 grams
item_weight	Item weight in store units	200 oz
item_carrier	Shipping carrier	UPS, USPS, FedEx, etc
item_carrier_type	Carrier type for the carrier selected for the item	
item_tracking_id	Shipping tracking id	1Z2342566632
item_postmark_date	Item postmark date	12 Dec 2003
item_postmark_date[*format*]	Item postmark date	12/12/2003
item_product_	Exposes all of the product variables as shown below	
item_variant_	Exposes all of the product variant variables as shown below	

12.1.b.2. Order Backordered Item Information

All the variables shown above can be used with “backordered_” in front of them to get a list of only the backordered items.

12.1.b.3. Order Shipment Information

When used in a text format a new line is created for each total in the order. When used in an HTML report a new row is create for each total in the order.

The SuperManager Variable / Replacement Code	Explanation	Example
shipment_id	Shipment ID	1, 2, 3, etc
shipment_carrier	Shipment Carrier	USPS, FedEx, UPS, etc.
shipment_package_type	Shipment package type for the selected export format	RECTPARCEL
shipment_tracking_id	Shipment tracking id	1Z2342566632
shipment_tracking_url	Shipment tracking url based on the format specified for the carrier	http://www.mycarrier.com/check_this_package.php?tracking=1Z234255
shipment_postmark_date	Shipment postmark date	12 Dec 2003
shipment_postmark_date[*format*]	Shipment postmark date	12/12/2003
shipment_postage	Shipment postage amount	13.00
shipment_weight_poundounce	Shipment weight in Lbs Oz	12 lbs 8 oz
shipment_weight_pound	Shipment weight in Lbs	12.5 lbs
shipment_weight_ounces	Shipment weight in Oz	200 oz
shipment_weight_kgram	Shipment weight in Kgrams	5.7 kgrams
shipment_weight_gram	Shipment weight in Grams	5700 grams
shipment_weight	Shipment weight in store units	200 oz
shipment_length	Shipment length	1
shipment_width	Shipment width	2
shipment_height	Shipment height	3
shipment_value	Declared value of the shipment	$49.95
shipment_insured shipment_insured_flag shipment_insured_boolean	Shipment insured	"Yes" or "No" “1” or “0” “True” or “False
shipment_signature shipment_signature _flag shipment_signature _boolean	Shipment signature required	"Yes" or "No" “1” or “0” “True” or “False
shipment_items	Number of line items in the shipment	1
shipment_ext_items	Number of items in the shipment (sum of the quantity of each line item in the shipment)	3

12.1.b.4. Order Total Information

When used in a text format a new line is created for each total in the order. When used in an HTML report a new row is create for each total in the order.

The SuperManager Variable / Replacement Code	Explanation	Example
total_name	Order Total Name	Subtotal, Shipping, Tax, etc.
total_amount	Order Total Amount	$56.15, $4.95, $3.77

12.1.b.1. Order Payment Information

When used in a text format a new line is created for each total in the order. When used in an HTML report a new row is create for each shipment in the order.

The SuperManager Variable / Replacement Code	Explanation	Example
payment_type	Type of transaction	Auth, Charge, Credit, etc…
payment_date	Transaction date	10 Jan 2004
payment_date[*format*]	Transaction date	See date format descriptors below
payment_time	Transaction time	10:05:59
payment_number	Authorization/transaction number	123456
payment_amount	Transaction amount	$59.88
payment_avs	AVS response for authorizations	YYY
payment_avs_meaning	AVS response meaning for authorizations	Addr OK
payment_cvv	CVV response for authorizations	M
payment_cvv_meaning	CVV response meaning for authorizations	Matched

12.1.c Product Information

The SuperManager Variable / Replacement Code	Explanation	Example
product_id	Product ID	Thesprmngr
product_code	Product code	THE_SUPER
product_description	Product description	Powerful order manager...
product_caption	Product caption	Powerful order manager...
product_hidden product_hidden_flag product_hidden_boolean	Product hidden	"Yes" or "No" “1” or “0” “True” or “False”
product_availability	Product availability	10
product_path_name	Product path name	Men's T-Shirts
product_paths_name	Multiple product path names	Men's T-Shirts, Boy's T-Shirts
product_path_url	Product path url	http://store.yahoo.com/sm/sm.html
product_paths_url	Multiple product path urls	http://store.yahoo.com/sm/sm.html, http:..
product_personalization_charge	Personalization charge	$25.00
product_giftwrap_charge	Gift wrap charge	$1.00
product_basePrice	Product base price	$2.00
product_averageCost	Average cost of product	$1.50
product_taxable product_taxable_flag product_taxable_boolean	Product taxable	"Yes" or "No" “1” or “0” “True” or “False”
product_orderable product_orderable_flag product_orderable_boolean	Product orderable	"Yes" or "No" “1” or “0” “True” or “False”
product_weight_poundounce	Product weight in pounds oz	12 lbs 8 oz
product_weight_pound	Product weight in pounds	12.5 lbs

The SuperManager Variable / Replacement Code	Explanation	Example
product_weight_ounce	Product weight in ounces	200 oz
product_weight_kgram	Product weight in kilograms	5.7 kgrams
product_weight_gram	Product weight in grams	5700 grams
product_weight	Product weight in store units	200 oz
product_picture_src	Product picture url	www.thesupermanager.com/thesprmngr.gif
product_picture	Product picture url	www.thesupermanager.com/thesprmngr.gif
product_thumbnail_src	Product thumbnail picture url	www.thesupermanager.com/thesprmngr.gif
product_thumbnail	Product Thumbnail Picture url	www.thesupermanager.com/thesprmngr.gif
product_url	Product url	www.thesupermanager.com/thesprmngr.html
product_min_order	Minimum order quantity	10
product_max_order	Maximum order quantity	15
product_quantum		
product_quantity_prices	Product quantity prices	5 at $5, 10 at $4, etc
product_option_lists	Product option list	Color: red, blue, green
product_origin_country	Product country of origination	United States
product_custom1	Product custom field 1	
product_custom2	Product custom field 2	

12.1.c.1. Product Variant Information

The SuperManager Variable / Replacement Code	Explanation	Example
variant_name	Variant Name	Blue-Small
variant_options	Variant Options	Blue-Small
variant_code	Product Alternative Code or Code	thesprmngr
variant_alternative_code	Alternative Code	the_supermanager
variant_upc	UPC/SKU code	1203948291
variant_supplier_part	Supplier part number	12345sm
variant_supplier	Supplier	SuperWare, LLC
variant_dropship variant_dropship_flag variant_dropship_boolean	Dropship	"Yes" or "No" “1” or “0” “True” or “False”
variant_quantity_on_hand	Quantity in Stock	10
variant_lead_time	Lead time after re-order (days)	3
variant_reorder_at	Level at which to re-order	3
variant_optimum_inventory	Optimum quantity in stock	6

12.1.d Merchant Batch Information

The SuperManager Variable / Replacement Code	Explanation	Example
batch_number	Batch number	00250

The SuperManager Variable / Replacement Code	Explanation	Example
batch_account	Batch account	Paymentech merchant account 234561202
batch_date	Batch date	10 Jun 04
batch_date[*format*]	Batch date	10/06/04
batch_amount	Batch amount	$30,223.00
batch_entries	Number of entries in the batch	1, 5, 20, etc.

12.1.d.1. Merchant Batch Entry Information

The SuperManager Variable / Replacement Code	Explanation	Example
batch_entry_number	Batch entry number	1, 5, 20, etc.
batch_entry_invoice	Batch entry invoice number	1202312334
batch_entry_approval	Batch entry approval number	030201
batch_entry_amount	Batch entry amount	$20.00
batch_entry_card_exp	Batch entry card expiration	mm/yyyy
batch_entry_card_num	Batch entry card number	XXXXXXXXXXXX1234
batch_entry_card_num_mask	Batch entry card number	5410123412341234
batch_entry_pay_method	Batch entry payment method	MasterCard

12.1.e Supplier Information

The SuperManager Variable / Replacement Code	Explanation	Example
supplier_name	Name of the supplier	SuperWare, LLC
supplier_contact_first_name	Contact first name	John
supplier_contact_last_name	Contact last name	Doe
supplier_contact	Contact full name	John Doe
supplier_address1	First line of the street address	111 Penny Lane
supplier_address2	Remaining lines of the street address	Suite 000
supplier_street	The street address	111 Penny Lane Suite 000
supplier_address	The full address	Suite 000 111 Penny Lane Penny City, CA 11111-1111
supplier_city	City	Penny City
supplier_state	State	CA
supplier_zip5	First 5 characters of the zip code	11111
supplier_zip	Zip Code	11111-1111
supplier_country_code	The two-letter abbreviation for the country	US
supplier_country	The full name of the country	United States
supplier_website	Supplier website	www.superware.com
supplier_email	Email address	info@thesupermanager.com
supplier_phone_number	Phone number – numbers only	8797971111
supplier_phone	Phone number	(879)797-1111

The SuperManager Variable / Replacement Code	Explanation	Example
supplier_fax	Fax phone number	(879)797-1112
supplier_account	Account number	123456
supplier_notes	Notes entered about the supplier	Hours: 9 – 5 Mon - Friday

12.1.f Purchase Order Information

The SuperManager Variable / Replacement Code	Explanation	Example
po_number	Number	1249
po_date	Date	10 Jun 04
po_date[*format*]	Date	10/06/04
po_time	Time	10:42 PM
po_required_date	Required date	10 Jun 04
po_required _date[*format*]	Required date	10/06/04
po_required _time	Required time	10:42 PM
po_expected_date	Expected date	10 Jun 04
po_expected _date[*format*]	Expected date	10/06/04
po_expected _time	Expected time	10:42 PM
po_notes	Notes	Please send it in the same packaging as last time
po_description	Description	Another order from us
po_ship_method	Ship method	Overnight
po_subtotal	Subtotal	$1203.23
po_shipping_charge	Charges for shipping	$40.00
po_import_tarrifs	Import duties	$234.99
po_total	Total PO amount	$1478.22
po_supplier_	Exposes all the supplier variables for the supplier the PO is addressed to	
po_items	Number of items in PO	1, 5, 20, etc.
po_item_list	Quick list of items in an PO, Item code(Qty)	WID_111(10), WID_222(9)
backordered_items	Number of backordered items	
backordered_item_list	Quick list of backordered items in a PO, Item code(Qty)	WID_111(10), WID_222(9)
po_scriptable[]	Special keyword to ensure the variable(s) inside the brackets compatable with java or other scripting languiages	po_scriptable[po_notes] would ensure that quotes and other reserved characters in the notes are not passed into the script.

12.1.f.1. PO Item Information

When used in a text format a new line is created for each total in the order. When used in an HTML report a new row is create for each total in the order.

The SuperManager Variable / Replacement Code	Explanation	Example
item_id	Item ID	thesprmngr

The SuperManager Variable / Replacement Code	Explanation	Example
item_code	Item code	THE_SUPER
item_supplier_part	Item supplier part number	THE_SUPER
item_description	Item description	Powerful order manager...
item_url	Item url	www.thesupermanager.com/thespr mngr.html
item_thumb	Item thumbnail picture including any meta data	www.thesupermanager.com/thespr mngr.gif
item_thumb_src	Item thumbnail picture	www.thesupermanager.com/thespr mngr.gif
item_options	Item options separated by carriage returns	Color = Red Size = Large (+1.00)
item_options_trim	Item options separated by carriage returns with any text in between parenthesis removed (as in incremental pricing)	Color = Red Size = Large
item_options_csv	Item options separated by commas	Color = Red, Size = Large (+1.00)
item_options_csv_trim	Item options separated by commas with any text in between parenthesis removed (as in incremental pricing)	Color = Red, Size = Large
item_option_choices	Item option choices separated by spaces	Red Large (+1.00)
item_option_choices_trim	Item option choices separated by spaces with any text in between parenthesis removed (as in incremental pricing)	Red Large
item_option*n*	The n^{th} item option choice	For item_option2 in the example above: Large (+1.00)
item_quantity_recieved	Number of items received	99
item_quantity_backordered	Number of items backordered	1
item_quantity	Item quantity	1
item_cost	Item cost	300
item_ext_cost	= quantity * cost	300
item_product_	Exposes all of the product variables as shown below	

12.1.f.2. PO Backordered Item Information

All the variables shown above can be used with “backordered_” in front of them to get a list of only the backordered items.

12.1.g Summary Report Variables

The following variables may be used in the summary report section to print a summary list of various information.

order_id	item_id
order_date	item_code
order_type	item_description
order_referrer	item_options
order_items	item_quantity
order_ship_method	item_price

order_total	item_ext_price
total_name	item_cost
total_amount	item_ext_cost
ship_city	shipment_carrier
ship_state	shipment_postage
ship_zip	shipment_weight_poundounce
ship_country	shipment_weight_pound
bill_city	shipment_weight_ounces
bill_state	shipment_weight_kgram
bill_zip	shipment_weight_gram
bill_country	shipment_weight

12.1.h Date format descriptors

The following variables may be embedded in the format designated after any date variable inside brackets.

Code	Meaning	Example (1 Jan 2006 12:01:02 AM)
%a	Abbreviated weekday name	Sun
%A	Full weekday name	Sunday
%b	Abbreviated month name	Jan
%B	Full month name	January
%c	Date and time representation appropriate for locale	1/1/2006 12:00:00 AM
%d	Day of month as decimal number (01 – 31)	01
%H	Hour in 24-hour format (00 – 23)	00
%I	Hour in 12-hour format (01 – 12)	12
%j	Day of year as decimal number (001 – 366)	001
%m	Month as decimal number (01 – 12)	01
%M	Minute as decimal number (00 – 59)	01
%p	Current locale's A.M./P.M. indicator for 12-hour clock	AM
%S	Second as decimal number (00 – 59)	02
%U	Week of year as decimal number, with Sunday as first day of week (00 – 53)	01
%w	Weekday as decimal number (0 – 6; Sunday is 0)	0
%W	Week of year as decimal number, with Monday as first day of week (00 – 53)	01
%x	Date representation for current locale	Depends on windows settings
%X	Time representation for current locale	Depends on windows settings
%y	Year without century, as decimal number (00 – 99)	06
%Y	Year with century, as decimal number	2006
%z, %Z	Either the time-zone name or time zone abbreviation, depending on registry settings; no characters if time zone is unknown	EST

12.2. Status Icons

Here is a list of the different possible order statuses in The SuperManager (see section 8.0)

The status icons help you to identify the status of an order in the Order List in the Order Details Dialog.

	Open: Indicates an order as open or working, initial status for all orders.
	Charged: Specifies that an order credit card has been charged
	Paid: Specifies that a PayPal, Cash, Check, etc payment has been received.
	Shipped: Specifies that an order has been marked Shipped or a tracking ID has been added.
	Charged and Shipped: Specifies that an order has been marked Charged and Shipped.
	Paid and Shipped: Specifies that an order has been marked Paid and Shipped.
	Backordered: Specifies that an order is on Backorder.
	Suspect: Specifies that an order has been marked Suspect.
	Fraud: Specifies that an order has been marked Fraud.
	Cancelled: Specifies that an order has been Cancelled.
	Closed: Specifies that an order has been marked Closed.

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